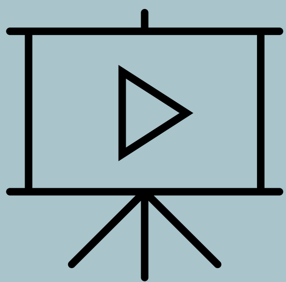
Skills Development Scotland

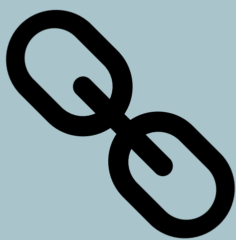
FIPS Quick Start Guide

How to Process Milestone and Outcome Claims for MA

This guide will cover how to process milestone and outcome claims for MA participants in FIPS. Milestone claims must be made on an individual basis and cannot be processed in a bulk submission.

- The links below provide a tutorial demonstration of how to process Milestones and Outcomes. Click on play to view this or right click and select Open in Browser to access it directly. Use the link icon to access the FIPS landing page on the SDS corporate website which contains additional FIPS guides and user information.



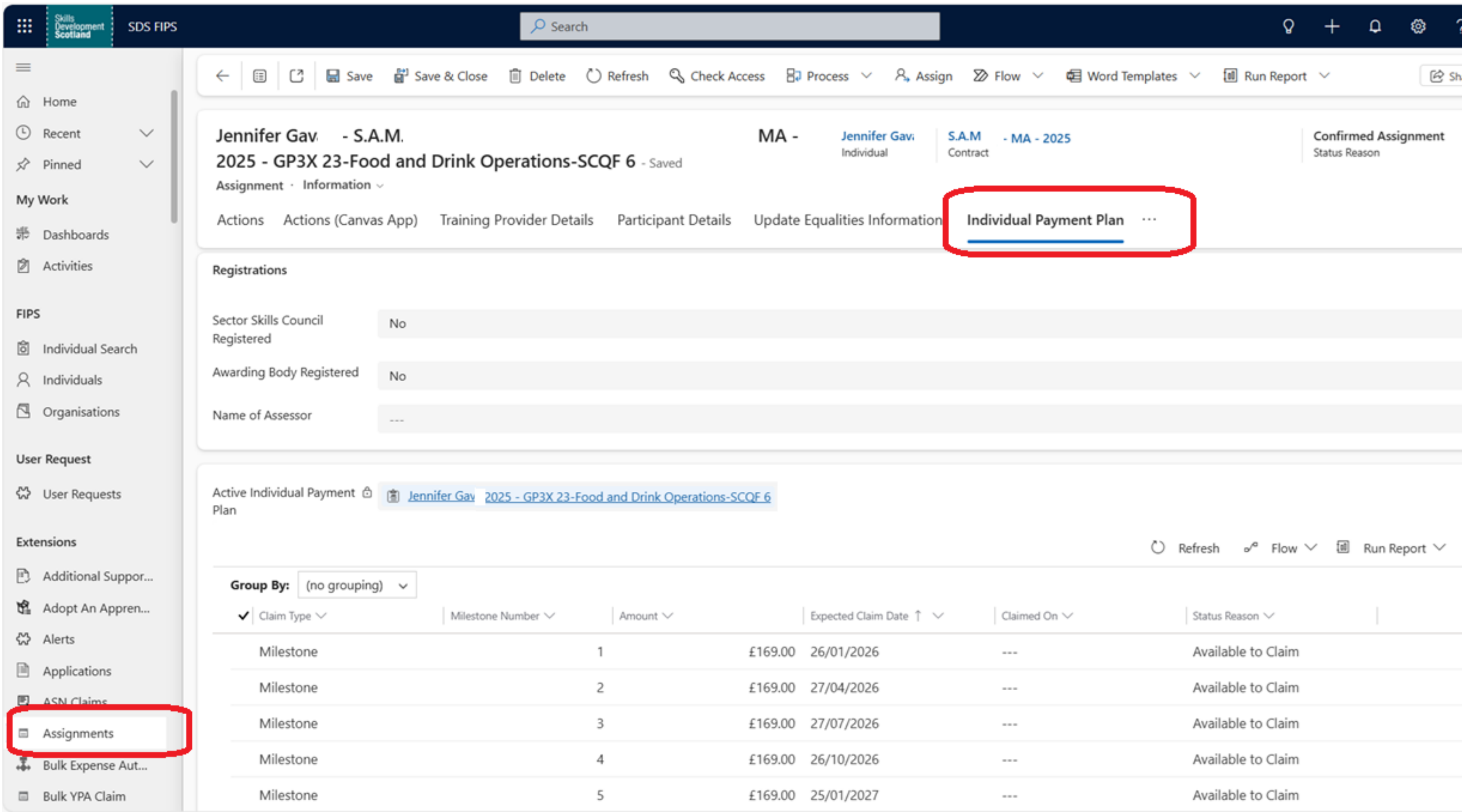


Guide last reviewed: 29/10/2025
Next review due: 29/01/2027

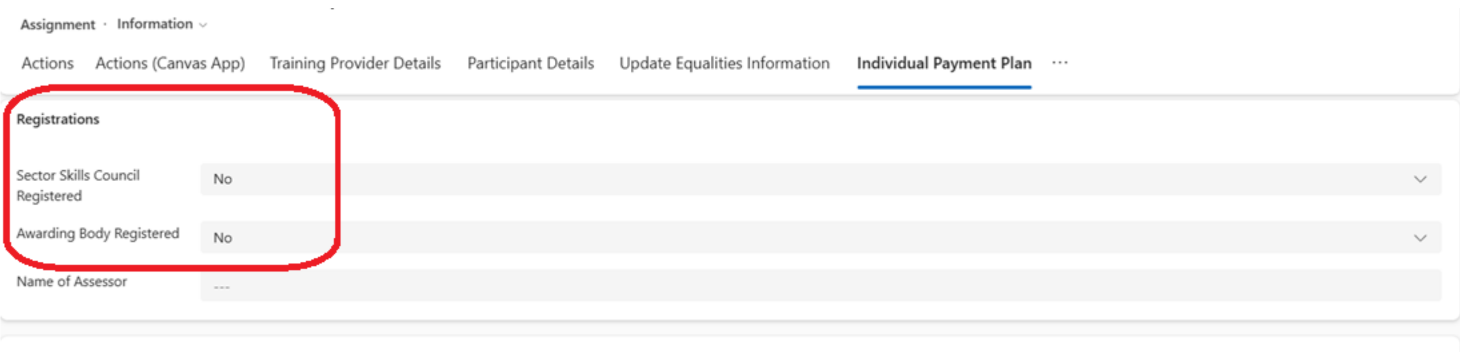
Created by FIPS Support Team

1. **To process a milestone or outcome claim, go to the Assignments entity, and open the assignment for the relevant participant. When the assignment opens, click into the Individual Payment Plan (IPP) tab to view the details of the IPP:**

Depending on your zoom/magnification settings some tabsmay be added to the ellipsis -

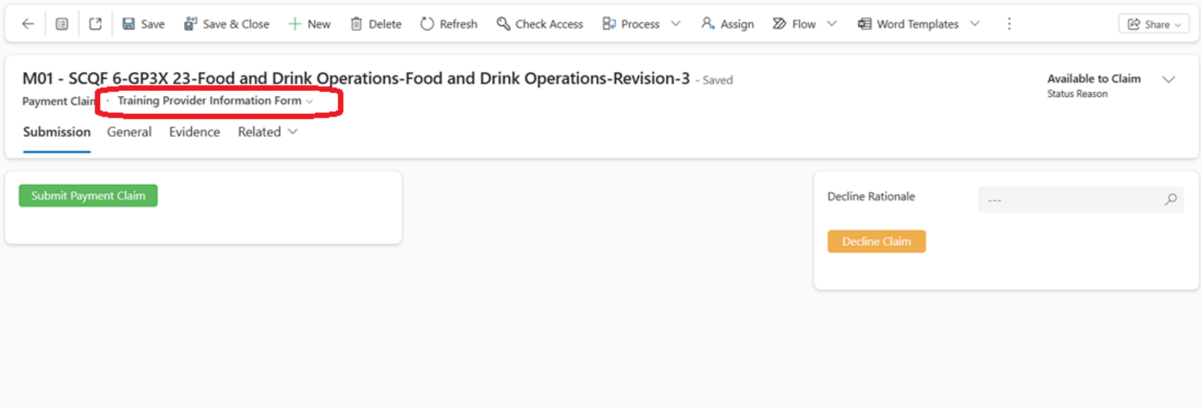


2. **The Registrations section within the IPP must have the fields set to <u>Yes</u> before claims can be processed. These fields will be set to No by default:**

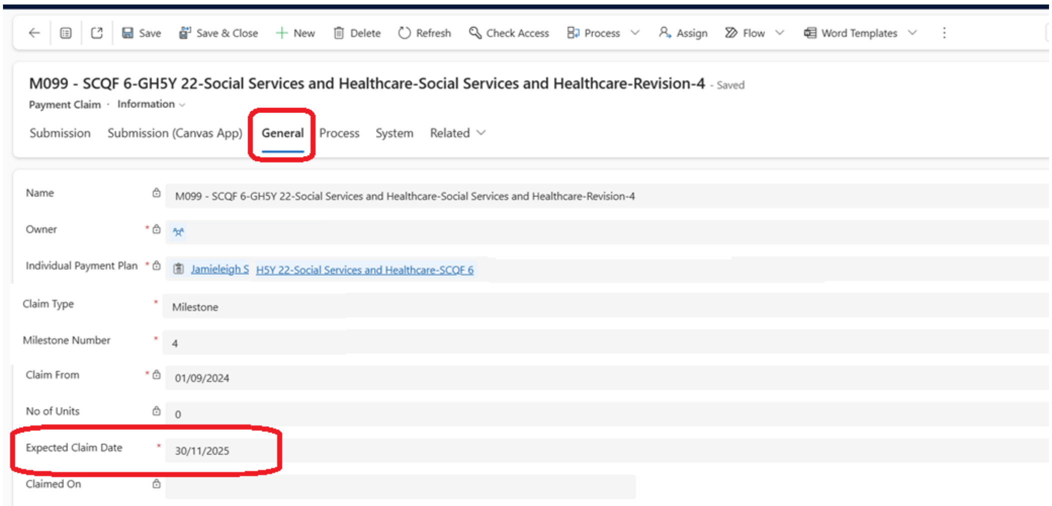


- ➢ **To set the fields to Yes, use the drop down and set it to Yes. - If the fields show as No, claims cannot be made. An error will be returned when a claim submission is attempted.**

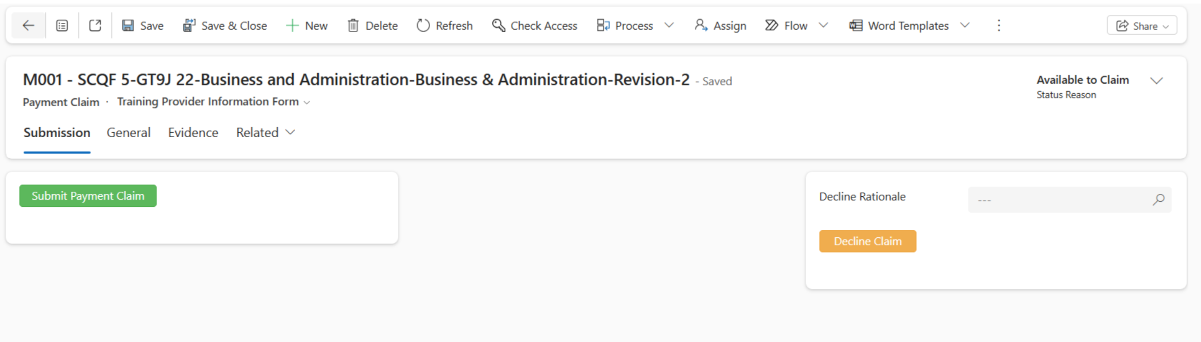
3. To submit a claim, double click on the relevant claim number to open the submission screen. Claims must have the status reason of Available to Claim – any other status will mean the claim cannot be submitted. Claims must be processed in sequential order:



- **Within the General tab, the Expected Claim Date of the milestone can be updated prior to the claim being submitted if required. This date cannot be prior to the previous claim claimed on date:**

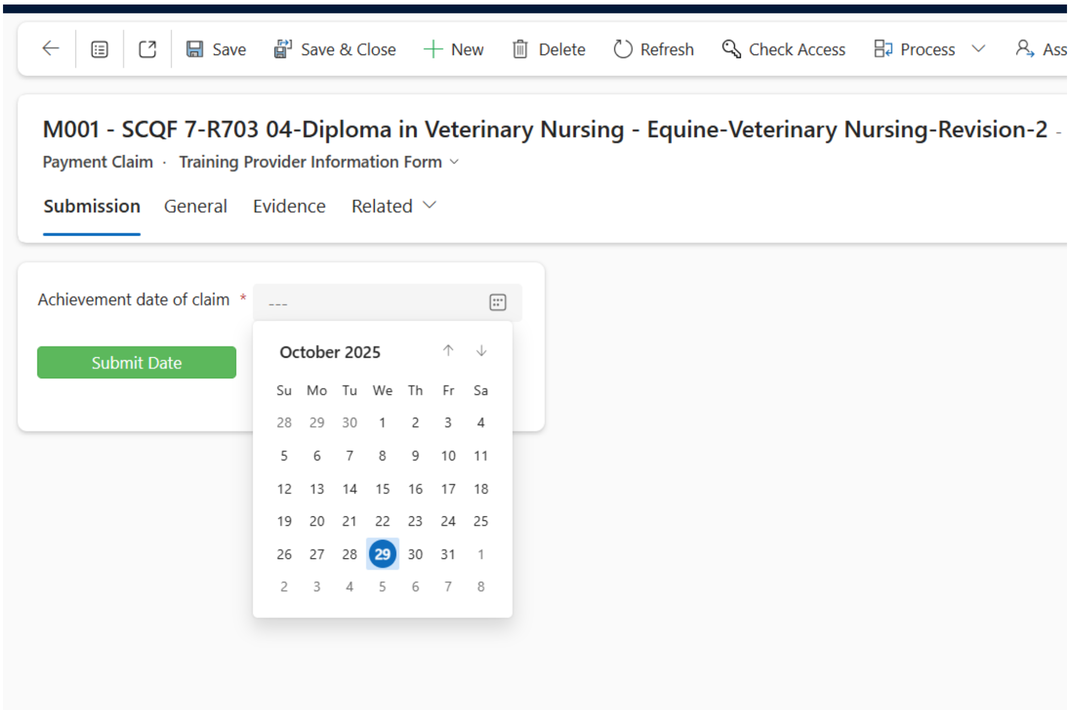


4. Within the Submission tab, the Submit Payment Claim button will be displayed. A Decline Claim button will also be displayed. To submit the claim, click on Submit Payment Claim:

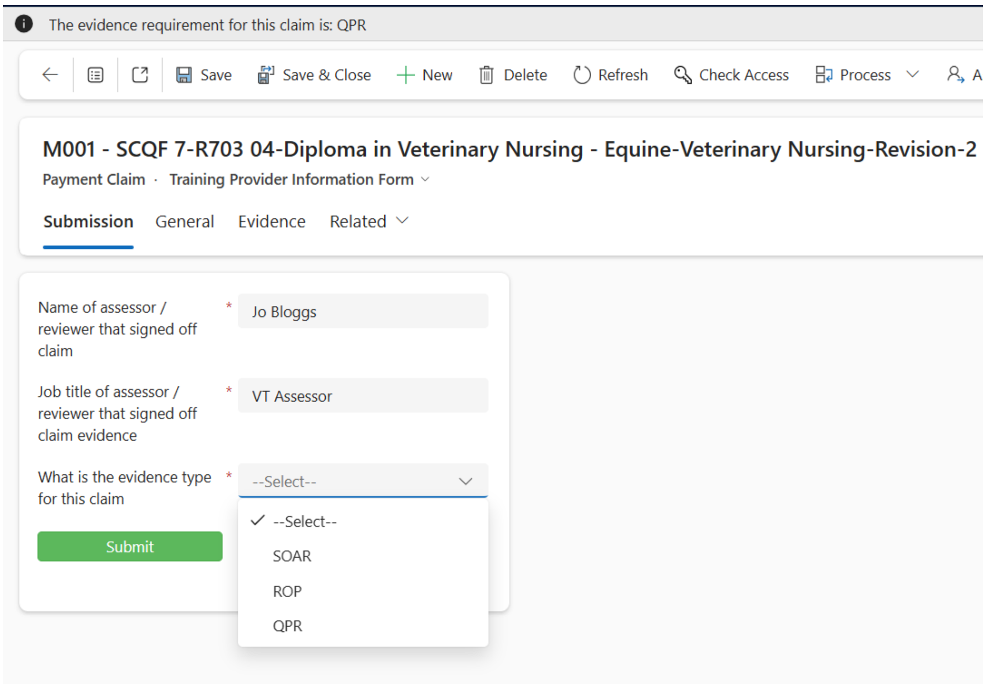


- Decline Claim should only be used when the Provider does not intend to submit the claim at all. Declining claims “skips” the milestone so that the next claim on the IPP can be processed. There is a separate Quick Start Guide that covers declining claims in more detail.

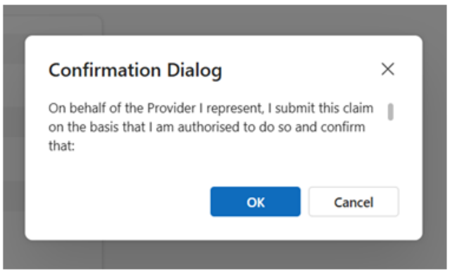
5. Select the achievement date of the claim using the calendar then claim on Submit Date:

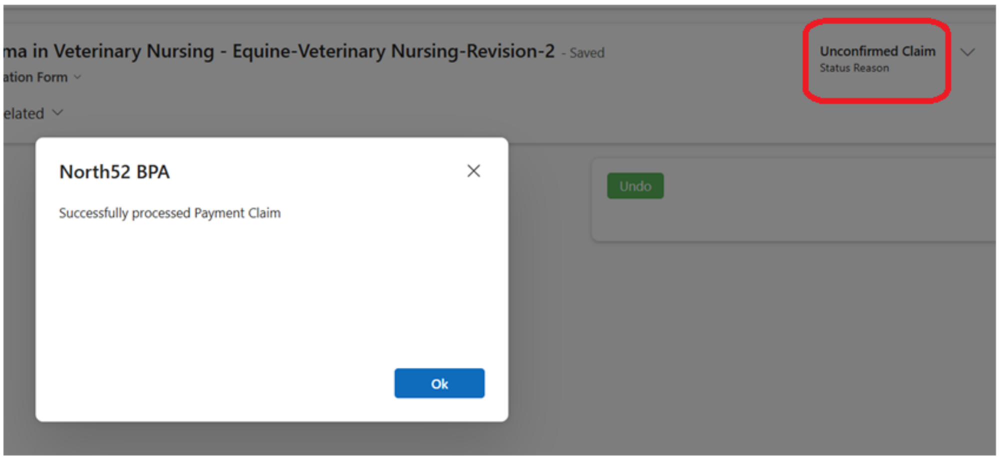


6. The screen will refresh. Complete the mandatory fields then click on Submit:



7. Click OK on the confirmation popup to complete the claim submission. If Cancel is selected, the claim will not be processed:





- If there are no issues with the submission, the claim will be processed, and the status will go to Unconfirmed Claim. If an error is returned, follow the instructions on the popup message to resolve the issue prior to reattempting the claim submission.

- Email addresses for participants must be at Validated status before claims can be made. If the email address is at Rejected or Timed Out status, an error will be returned on the claim submission.

- If the awarding body for the qualification is SQA, milestone 1 and outcome claims will be checked via Electris when processed in FIPS. Electris is the automatic link between FIPS and SQA – this check ensures that the participant is registered at SQA with the relevant qualification details. If there is an issue with the details and the data does not match between FIPS and SQA, the claim will go to Holding status in FIPS. Records can be progressed within the Electris entity.

- Validation messages for claims do not get sent out on the day a claim is made. The validation process for claims begins on a Friday. Any claims submitted will be displayed within the Payments entity on the Pre-Posting view which will show all claims made that week.

- For Outcome claims, the same process as above should be followed. For Outcome claims to be made, Leaving Details must be entered on the assignment and the status of the assignment at "Leaver (Active)". There is a separate guidance document that covers how to input leaving details – refer to "Adding and Amending Leaving Details".