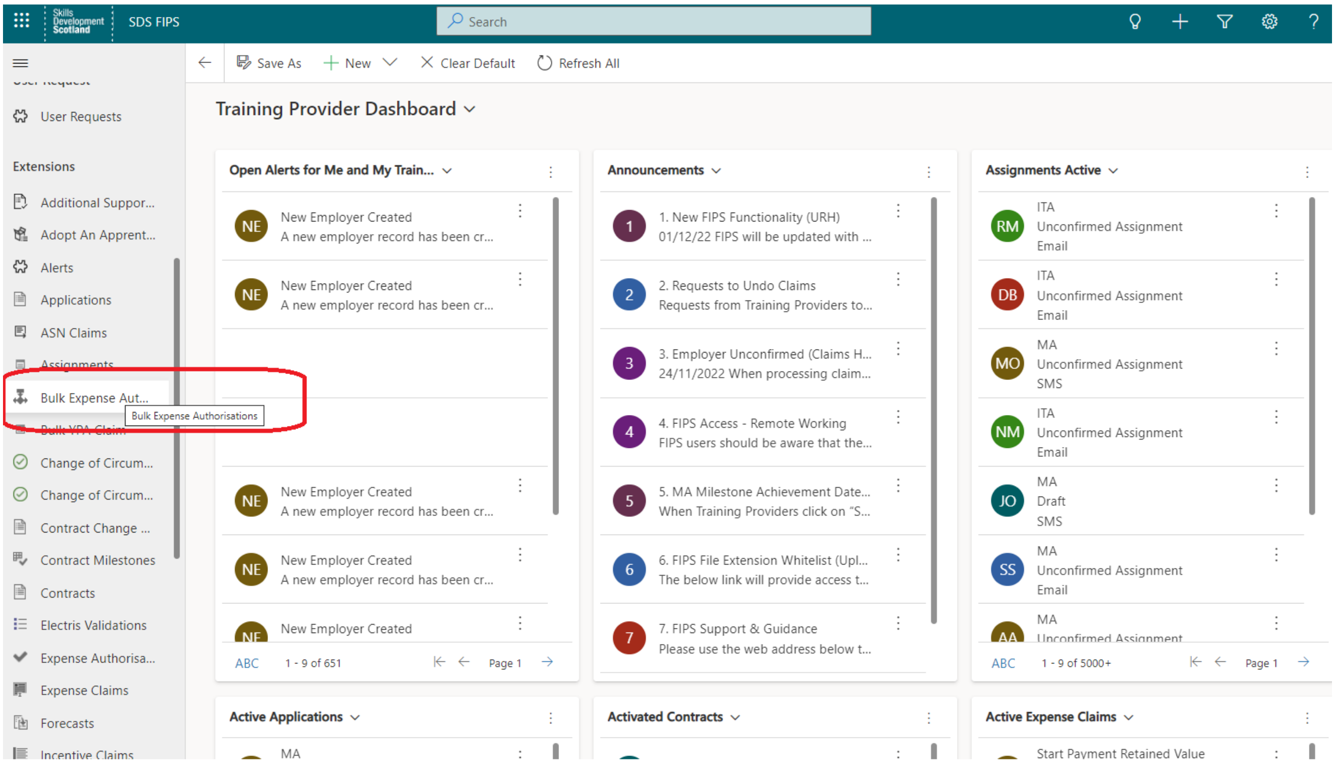
# FIPS QUICK START GUIDE

## Bulk Expense Authorisation

**This guide will cover how to create a Bulk Expense Authorisation which will enable expense claims to be submitted against an approved Bulk Expense Authorisation.**

**There is a video guide that covers this process – click on the play button to view this.**

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


Skills Development Scotland
SDS FIPS
Search
Save As
New
Clear Default
Refresh All
User Requests
Extensions
Additional Suppor...
Adopt An Apprent...
Alerts
Applications
ASN Claims
Assignments
Bulk Expense Aut...
Bulk Expense Authorisations
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Change of Circum...
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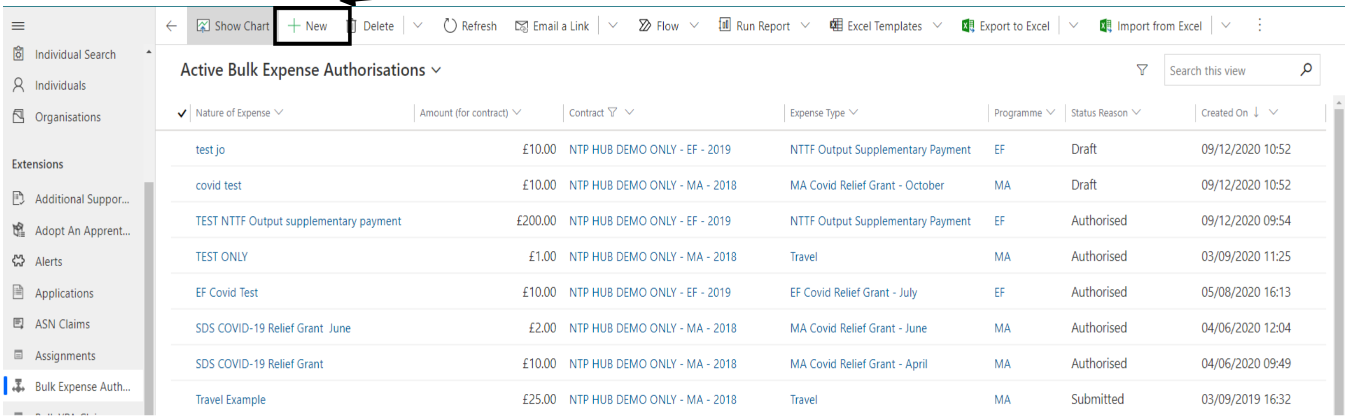
Contract Change ...
Contract Milestones
Contracts
Electris Validations
Expense Authorisa...
Expense Claims
Forecasts
Incentive Claims
Training Provider Dashboard
Open Alerts for Me and My Train...
NE New Employer Created
A new employer record has been cr...
ABC 1 - 9 of 651 Page 1
Announcements
1. New FIPS Functionality (URH)
01/12/22 FIPS will be updated with ...
2. Requests to Undo Claims
Requests from Training Providers to...
3. Employer Unconfirmed (Claims H...
24/11/2022 When processing claim...
4. FIPS Access - Remote Working
FIPS users should be aware that the...
5. MA Milestone Achievement Date...
When Training Providers click on "S...
6. FIPS File Extension Whitelist (Upl...
The below link will provide access t...
7. FIPS Support & Guidance
Please use the web address below t...
Assignments Active
RM ITA Unconfirmed Assignment Email
DB ITA Unconfirmed Assignment Email
MO MA Unconfirmed Assignment SMS
NM ITA Unconfirmed Assignment Email
JO MA Draft SMS
SS MA Unconfirmed Assignment Email
AA MA Unconfirmed Assignment
ABC 1 - 9 of 5000+ Page 1
Active Applications
MA
Activated Contracts
Active Expense Claims
Start Payment Retained Value

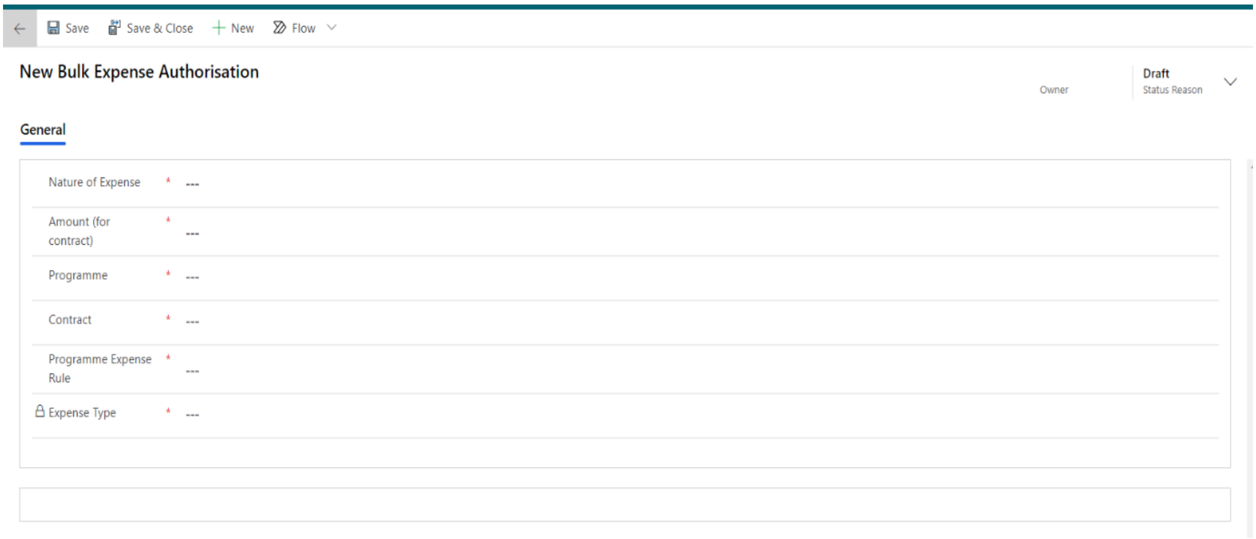
1. **The view will default to Active Bulk Expense Authorisations. This screen should be used to create a new Bulk Expense Authorisation. Click on New to open the form:**


Show Chart
New
Delete
Refresh
Email a Link
Flow
Run Report
Excel Templates
Export to Excel
Import from Excel
Individual Search
Individuals
Organisations
Extensions
Additional Suppor...
Adopt An Apprent...
Alerts
Applications
ASN Claims
Assignments
Bulk Expense Auth...
Search this view

Active Bulk Expense Authorisations

| Nature of Expense | Amount (for contract) | Contract | Expense Type | Programme | Status Reason | Created On |
|---|---|---|---|---|---|---|
| test jo | £10.00 | NTP HUB DEMO ONLY - EF - 2019 | NTTF Output Supplementary Payment | EF | Draft | 09/12/2020 10:52 |
| covid test | £10.00 | NTP HUB DEMO ONLY - MA - 2018 | MA Covid Relief Grant - October | MA | Draft | 09/12/2020 10:52 |
| TEST NTTF Output supplementary payment | £200.00 | NTP HUB DEMO ONLY - EF - 2019 | NTTF Output Supplementary Payment | EF | Authorised | 09/12/2020 09:54 |
| TEST ONLY | £1.00 | NTP HUB DEMO ONLY - MA - 2018 | Travel | MA | Authorised | 03/09/2020 11:25 |
| EF Covid Test | £10.00 | NTP HUB DEMO ONLY - EF - 2019 | EF Covid Relief Grant - July | EF | Authorised | 05/08/2020 16:13 |
| SDS COVID-19 Relief Grant June | £2.00 | NTP HUB DEMO ONLY - MA - 2018 | MA Covid Relief Grant - June | MA | Authorised | 04/06/2020 12:04 |
| SDS COVID-19 Relief Grant | £10.00 | NTP HUB DEMO ONLY - MA - 2018 | MA Covid Relief Grant - April | MA | Authorised | 04/06/2020 09:49 |
| Travel Example | £25.00 | NTP HUB DEMO ONLY - MA - 2018 | Travel | MA | Submitted | 03/09/2019 16:32 |

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:**

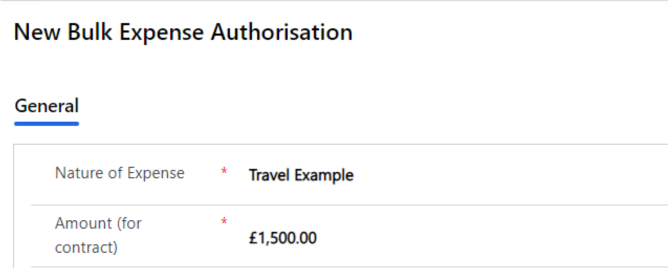

Save
Save & Close
New
Flow
Owner
General

New Bulk Expense Authorisation

Draft
Status Reason

| | |
|---|---|
| Nature of Expense * | --- |
| Amount (for contract) * | --- |
| Programme * | --- |
| Contract * | --- |
| Programme Expense Rule * | --- |
| Expense Type * | --- |

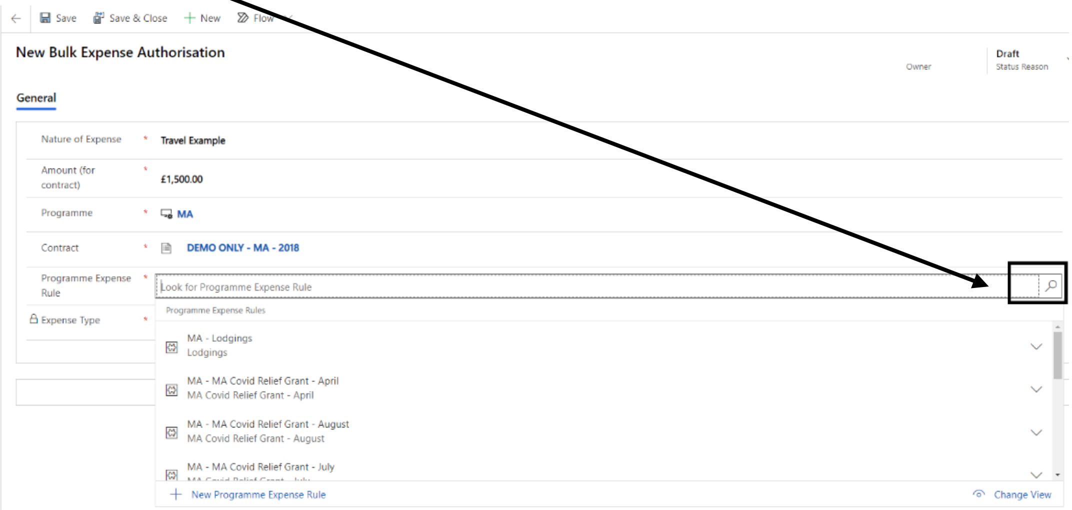
2. **Click into the Nature of Expense field and enter the relevant information for the claim. This is a free text field and must be manually typed into. In the Amount (for contract) field enter the value of the claim. (This cannot be more than the expense value agreed in the Training Provider contract):**



New Bulk Expense Authorisation

| | |
|---|---|
| Nature of Expense * | Travel Example |
| Amount (for contract) * | £1,500.00 |

3. **Use the magnifying glass lookup to 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):**


Save
Save & Close
New
Flow
Owner
Draft
Status Reason
General
Look for Programme Expense Rule
Programme Expense Rules
MA - Lodgings
Lodgings
MA - MA Covid Relief Grant - April
MA Covid Relief Grant - April
MA - MA Covid Relief Grant - August
MA Covid Relief Grant - August
MA - MA Covid Relief Grant - July
New Programme Expense Rule
Change View

New Bulk Expense Authorisation

Nature of Expense * Travel Example

Amount (for contract) * £1,500.00

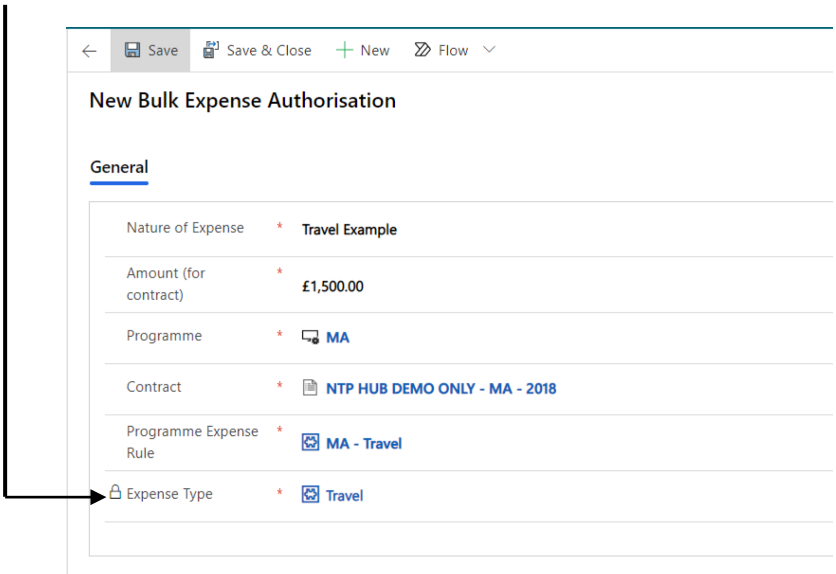
Programme * MA

Contract * DEMO ONLY - MA - 2018

Programme Expense Rule *

Expense Type *

4. **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 ribbon bar:**


Save
Save & Close
New
Flow
General

New Bulk Expense Authorisation

Nature of Expense * Travel Example

Amount (for contract) * £1,500.00

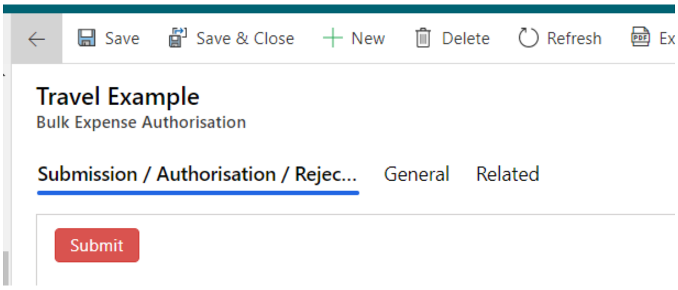
Programme * MA

Contract * NTP HUB DEMO ONLY - MA - 2018

Programme Expense Rule * MA - Travel

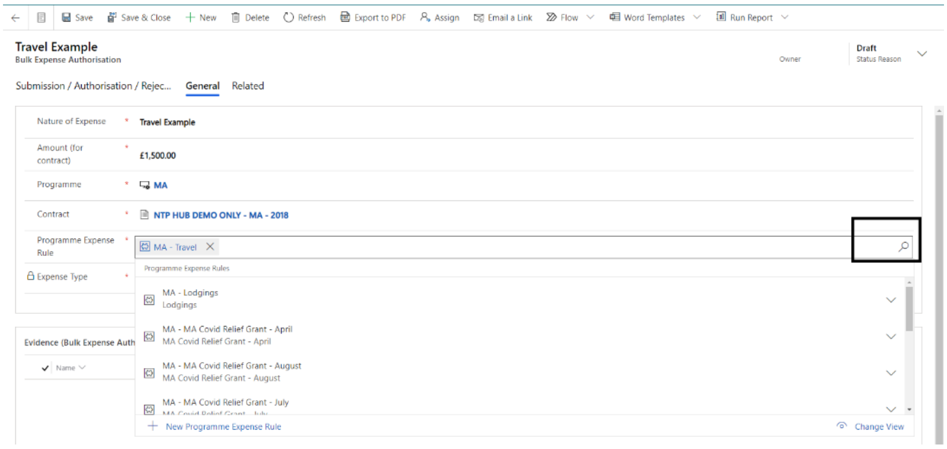
Expense Type * Travel

5. **This action will refresh the screen and the Submit button will appear:**


Save
Save & Close
New
Delete
Refresh
Ex
Submission / Authorisation / Rejec...
General
Related
Submit

Travel Example
Bulk Expense Authorisation

6. **If the information added 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:**


Save
Save & Close
New
Delete
Refresh
Export to PDF
Assign
Email a Link
Flow
Word Templates
Run Report
Submission / Authorisation / Rejec...
General
Related
Programme Expense Rules
New Programme Expense Rule
Change View
Evidence (Bulk Expense Auth
Name

Travel Example
Bulk Expense Authorisation

Owner
Draft
Status Reason

| | |
|---|---|
| Nature of Expense * | Travel Example |
| Amount (for contract) * | £1,500.00 |
| Programme * | MA |
| Contract * | NTP HUB DEMO ONLY - MA - 2018 |
| Programme Expense Rule * | MA - Travel |
| Expense Type * | |

MA - Lodgings
Lodgings

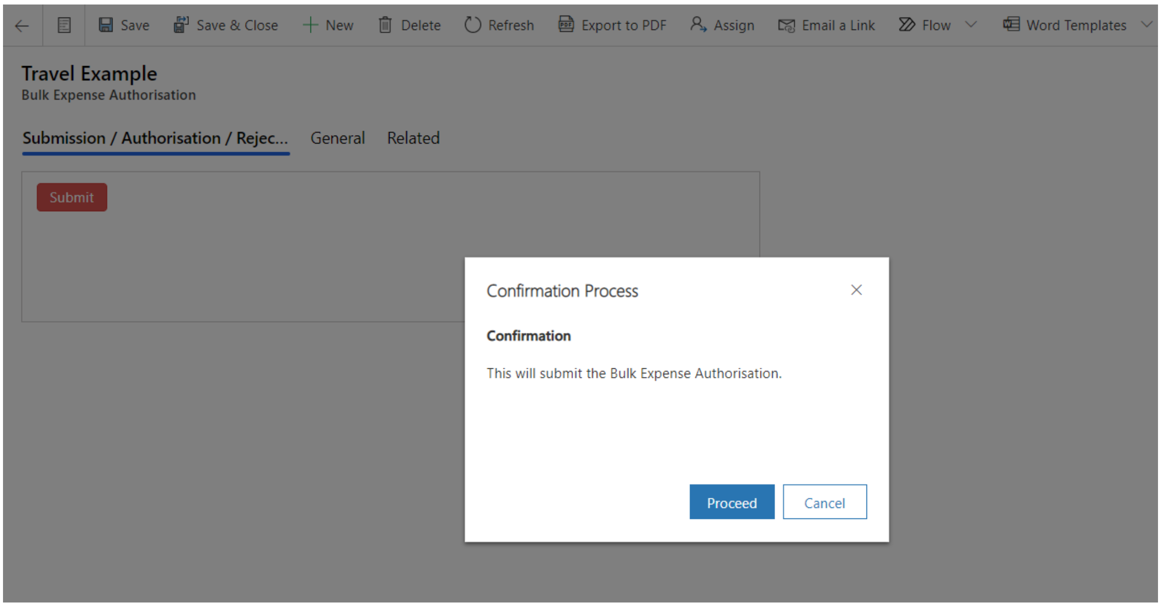
MA - MA Covid Relief Grant - April
MA Covid Relief Grant - April

MA - MA Covid Relief Grant - August
MA Covid Relief Grant - August

MA - MA Covid Relief Grant - July

**Click back into the Submission / Authorisation / Rejection tab to submit the Bulk Expense Authorisation to SDS for approval.**

7. **Click on Submit – a series of submission boxes will appear. Click on Proceed to continue with the submission. Clicking on Cancel will leave the Bulk Expense Authorisation in Draft status:**


Save
Save & Close
New
Delete
Refresh
Export to PDF
Assign
Email a Link
Flow
Word Templates
Submission / Authorisation / Rejec...
General
Related
Submit
Proceed
Cancel

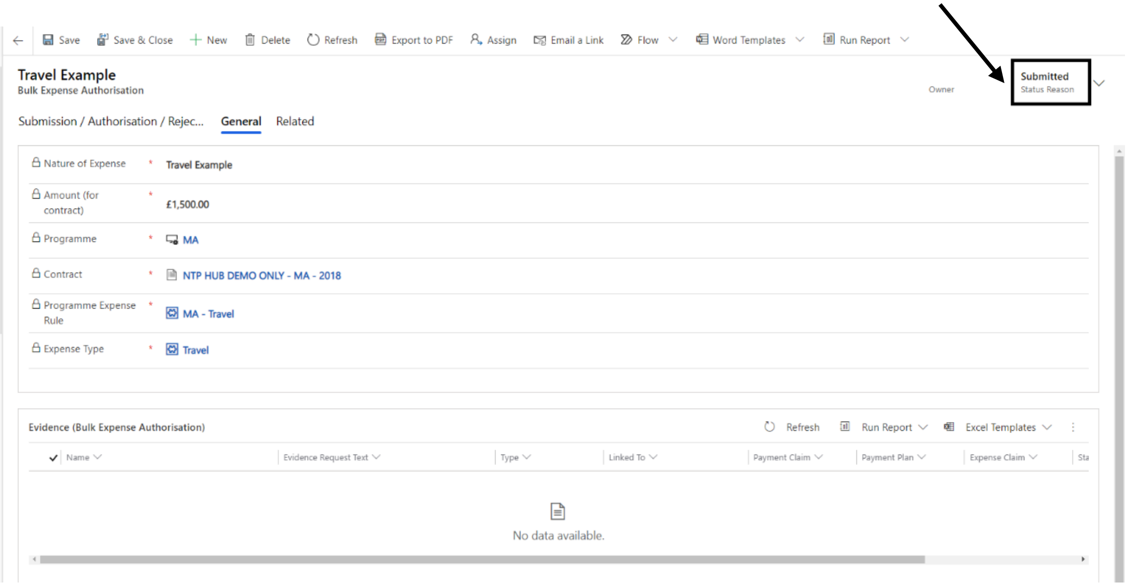
Travel Example
Bulk Expense Authorisation

Confirmation Process

**Confirmation**

This will submit the Bulk Expense Authorisation.

8. **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 request will be reviewed by the SDS Contracts team. It will then be approved or rejected:**


Save
Save & Close
New
Delete
Refresh
Export to PDF
Assign
Email a Link
Flow
Word Templates
Run Report
Owner
Submission / Authorisation / Rejec...
General
Related
Refresh
Run Report
Excel Templates

Travel Example
Bulk Expense Authorisation

Submitted
Status Reason

| | |
|---|---|
| Nature of Expense * | Travel Example |
| Amount (for contract) * | £1,500.00 |
| Programme * | MA |
| Contract * | NTP HUB DEMO ONLY - MA - 2018 |
| Programme Expense Rule * | MA - Travel |
| Expense Type * | Travel |

Evidence (Bulk Expense Authorisation)

| Name | Evidence Request Text | Type | Linked To | Payment Claim | Payment Plan | Expense Claim | Sta |
|---|---|---|---|---|---|---|---|

No data available.

- 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, expense claims can be submitted against the Bulk Expense Authorisation. There is a separate guidance document that covers submitting expense claims.