# FIPS Quick Start Guide

How to Update Expected Claim Dates

This guide will cover how to update Expected Claim Dates for milestone and outcome claims for MA assignments, within the Individual Payment Plan for a participant. If the Payment Type for the qualification on a participant assignment is QPR, Learning Providers should not edit Expected Claim Dates in these instances. If an assignment has a QPR payment plan you must adhere to all the mandatory requirements set out in the MA Conditions and Specification.

➤ The links below provide a tutorial demonstration of how to amend expected claim dates. 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.
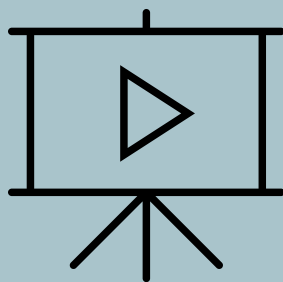
Milestone / Outcome Expected Claim Dates

Summary of Achievement Record (SOAR) Payment Plan

To update an Expected Claim Date for a milestone or outcome claim, click into the Individual Payment Plan (IPP) tab within an assignment and scroll down to the IPP details:

- Expected Claim Dates can only be updated for claims with a status reason of Available to Claim.

- Confirmed or Unconfirmed claims (claims that have already been processed for payment) cannot have the Expected Claim Date changed as this information is locked after submission.

The current Expected Claim Date is shown within the IPP grid. To change the date for a claim, click into the Expected Claim Date field on the grid for the relevant claim(s):

After clicking into the field, it will become editable. This can be seen in the screenshot above. Use the dropdown arrow to access the calendar or manually input the relevant date in DD/MM/YYYY format:

- Expected Claim Dates can be updated for multiple claims by editing the relevant field then clicking into the field for the next claim and updating the date in that field. Continue in sequential order to update all the claim expected claim dates required, and once complete, click on Save on the top menu bar of the assignment to save the changes.

After the changes have been made, the new dates will now be displayed on the IPP:

- Use the arrow at the bottom of the grid to access the other claims on the IPP to amend those if required.

Learning Providers must update milestone Expected Claim Dates as soon as a change is identified to this date e.g. during a review. Expected Claim dates must follow a sequential pattern. FIPS will automatically recalculate the next milestone Expected Claim Date to a future date, in instances when the previous milestone date is changed to a date that is close to the Expected Claim Date of the next milestone. This is to ensure that dates are sequential and kept current.

If the Outcome Expected Claim Date is changed on the IPP, the assignment Expected End Date will be automatically updated to match this. The reverse of this will also happen – if the assignment Expected End Date is amended, the Outcome Expected Claim Date will be automatically updated.
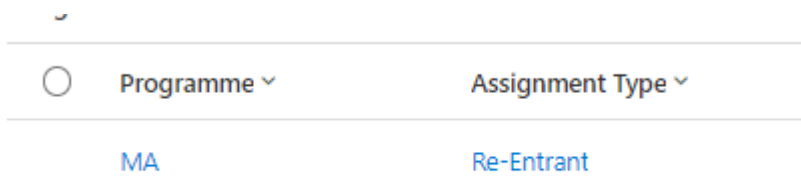
Re-Entrants with a SOAR Payment Plan

Re-entrants on a SOAR can use the IPP editable grid to amend dates as described above.

Quarterly Progress Review (QPR) Payment Plan

For a QPR Payment Plan, you are required to update the assignment Expected End Date on FIPS. The remaining milestones will be automatically adjusted on FIPS in accordance with the new end date entered.

Re-Entrants with a QPR Payment Plan

◯	Programme ˅	Assignment Type ˅
	MA	Re-Entrant

> ➢ **If an apprentice has an assignment type of Re-Entrant and the milestones / outcome requires an update to the Expected Claim Date, regardless of if the Payment Type is QPR, this can be done by clicking into the relevant claim on the IPP (re-entrants on a SOAR can use the IPP editable grid to amend dates as noted above).**

- **Double click on the relevant claim to open the claim record:**

- Click into the General tab, then click into the Expected Claim Date field:
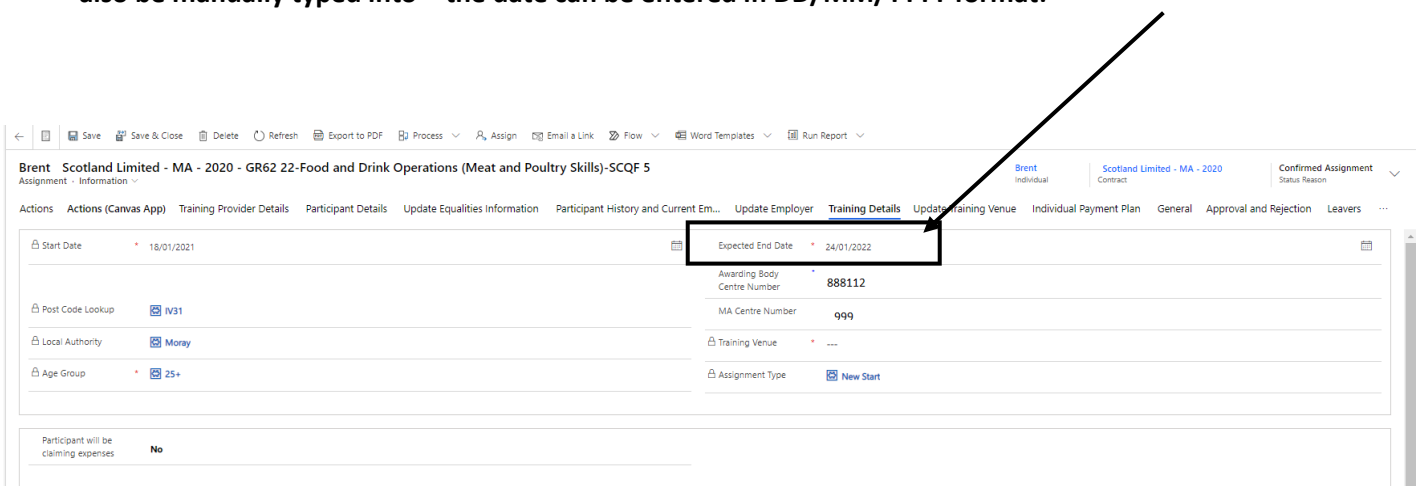

Select the new expected claim date for the claim then click on Save and Close to return to the assignment. Repeat as necessary for any claims on the IPP.

Expected End Dates

Where a candidate will achieve the full apprenticeship early, Providers are required to update the Expected End Date for the assignment on FIPS. The remaining milestones will be automatically adjusted within the Individual Payment Plan tab of the assignment in accordance with the new Expected End Date entered.

To update an Expected End Date for an assignment, open the relevant assignment for the participant. Assignments can be found within the Assignments entity on the Workplace menu. To update the Expected End Date of the assignment, click into the Training Details tab. Click into the Expected End Date field. The calendar will open and the new date can be selected. This field can also be manually typed into – the date can be entered in DD/MM/YYYY format:

After the change has been made, the assignment must be saved. Click on "Save" on the top menu bar. When an Expected End Date is updated, the Outcome claim Expected Claim Date on the Individual Payment Plan will be automatically updated in line with the new Expected End Date.

If an Expected End Date of an assignment is in the past, users will be unable to submit claims for that participant and an error message will be returned on the claim submission:
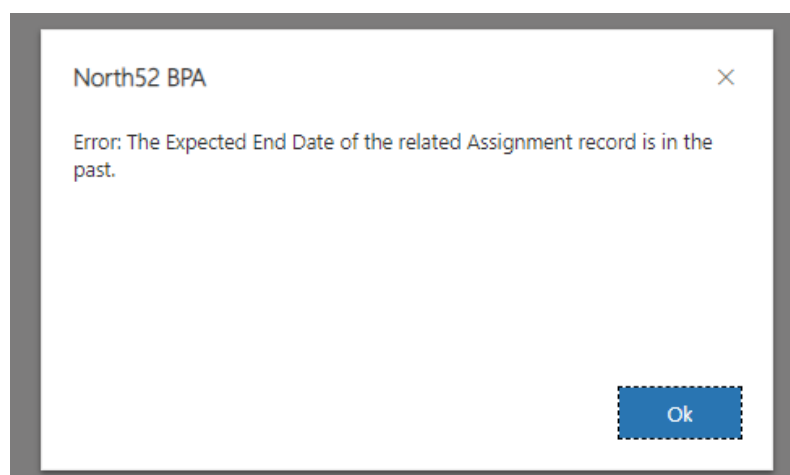
The Expected End Date must be kept up to date during training and must be current for claims to be submitted.