

FIPS QUICK START GUIDE

Updating Expected Claim Dates

This guide will cover how to update Expected Claim Dates for Milestones and Outcome claims on an MA assignment. There is an embedded video demo of this on page 2.

Milestone / Outcome Expected Claim Dates

- 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:

Claim Type	Milestone Number	Amount	Expected Claim Date	Claimed On	Status Reason
Start Payment	0	£150.00	06/11/2023	08/11/2023 15:17	Confirmed Claim
Milestone	2	£473.00	07/09/2024	---	Available to Claim
Milestone	1	£473.00	08/09/2024	---	Available to Claim
Milestone	3	£473.00	15/09/2024	---	Available to Claim

- Expected Claim Dates can only be updated for claims with a status reason of Available to Claim. Confirmed / Unconfirmed claims (claims that have already been submitted) cannot have the Expected Claim Date changed.

- 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):

Claim Type	Milestone Number	Amount	Expected Claim Date	Claimed On	Status Reason
Start Payment	0	£150.00	06/11/2023	08/11/2023 15:17	Confirmed Claim
Milestone	1	£473.00	08/09/2024	---	Available to Claim
Milestone	2	£473.00	07/09/2024	---	Available to Claim
Milestone	3	£473.00	15/09/2024	---	Available to Claim

3. 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:

Actions Actions (Canvas App) Training Provider Details Participant Details Update Equalities Information **Individual Payment Plan** ...

Edit Delete Payment Claim

Group By: (no grouping)

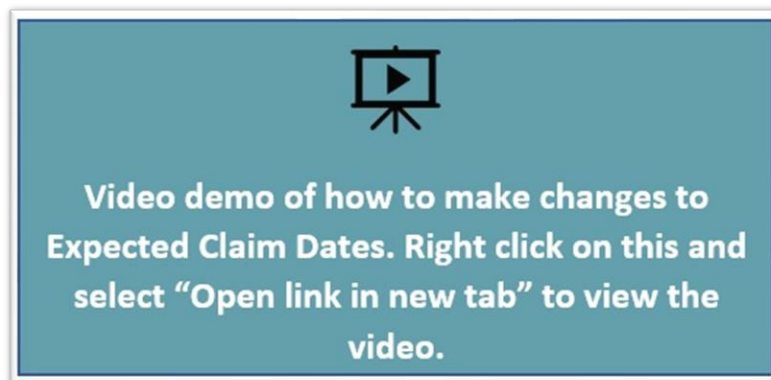
Claim Type	Milestone Number	Amount	Expected Claim Date	Claimed On	Status Reason
Start Payment	0	£150.00	30/01/2024	13/02/2024 11:11	Confirmed Claim
✓ Milestone	1	£204.00	30/04/2024	---	Available to Claim
Milestone	2	£204.00			Available to Claim
Milestone	3	£204.00			Available to Claim

Individual Payment Plan

No of Units: 6
Last updated: 15/02/2024 10:59

Total Paid: £150.00
Last updated: 15/02/2024 10:59

- Expected Claim Dates can be updated for multiple claims in one session. To do this, edit the relevant field then click into the field for the next claim and edit the data in that field. Continue as required and once complete, click on Save on the top menu bar to save the changes.



The video above provides a demonstration of how to amend the Expected Claim Dates. Right click and then select "Open link in new tab" to view this. The video contains no sound and is a demonstration only.

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

Tue Day - October 2023 Test Training Limited - MA - 2023 - GH0H 23-Dental Nursing-SCQF 7 - Saved

Tues Day Individual | October 2023 Test Training Limited - MA - 2023 Contract | Confirmed Assignment Status Reason

Actions Actions (Canvas App) Training Provider Details Participant Details Update Equalities Information Participant History and Current Em... Update Employer Individual Payment Plan ...

Awarding Body Registered No

Active Individual Payment Plan **Tues Day - October 2023 Test Training Limited - MA - 2023 - GH0H 23-Dental Nursing-SCQF 7**

Refresh Flow Run Report Excel Templates

Group By: (no grouping)

Claim Type	Milestone Number	Amount	Expected Claim Date	Claimed On	Status Reason
Start Payment	0	£150.00	06/11/2023	08/11/2023 15:17	Confirmed Claim
Milestone	1	£473.00	14/08/2024	---	Available to Claim
Milestone	2	£473.00	16/10/2024	---	Available to Claim
Milestone	3	£473.00	20/11/2024	---	Available to Claim

Individual Payment Plan

- 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, the assignment Expected End Date will be auto updated to match the Expected Claim Date input for the Outcome claim. The reverse of this will also happen – if the Assignment Expected End Date is amended, the Outcome Expected Claim Date will be automatically updated to match the Expected End Date. **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 you experience any usability issues when attempting to make changes to the Expected Claim Dates, use the “New Look” toggle located across the top ribbon banner and try it again when FIPS loads in the new look layout:

