

FIPS Quick Start Guide

How to Process Milestone and Outcome Claims
for Foundation Apprenticeships from the
Payment Claims Entity

This guide will cover how to create a list of milestones and outcome claims for Foundation Apprenticeship participants in FIPS via the Payment Claims entity in order to submit claims. There is a separate guide on how to submit claims from within a participant assignment directly. Claims must be submitted on an individual basis for each participant and cannot be processed in bulk for multiple claims or assignments at once.

Please note some milestones will be set to zero value however these claims must still be processed.

FA Providers with higher volumes of contracted starts may find it more efficient to use the Advanced Find view **FA Claims – Available to Claim** and submit claims through the Payment Claims entity per the steps in this guide. Claims can also be made by clicking into an assignment from the Assignments entity and opening the Individual Payment Plan tab to submit the claim(s).

1. Go to the Payment Claims entity and select the view: **FA Claims – Available To Claim:**

Individual	Contract (Deriv...)	Status Reason	Training Provider...	Programme ...	Framework (Derived)	VQ Level...	Start Date (...)	Expected End Date (...)	Claim Type	Milestone Num...	Amount
Test9981 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Engineering (FA)	SCQE 6	27/05/2026	29/05/2027	Milestone	2	£0.00
Test9981 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Engineering (FA)	SCQE 6	27/05/2026	29/05/2027	Outcome	3	£200.00
Test9982 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Engineering (FA)	SCQE 6	05/07/2026	24/11/2027	Milestone	2	£0.00
Test9982 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Engineering (FA)	SCQE 6	05/07/2026	24/11/2027	Outcome	3	£200.00
Test9005 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Accountancy (FA)	SCQE 6	14/04/2026	14/12/2026	Milestone	2	£0.00
Test9005 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Accountancy (FA)	SCQE 6	14/04/2026	14/12/2026	Milestone	3	£55.00
Test9005 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Accountancy (FA)	SCQE 6	14/04/2026	14/12/2026	Outcome	3	£95.00
Test9032 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Engineering (FA)	SCQE 6	02/04/2026	30/04/2026	Outcome	4	£400.00

- Filter on the Milestone Number column to identify the relevant milestone (E.g., Milestone 1) and save this as a new view with a new name. This view will now be owned by you, and you can order it /filter and make any amendments you require:

VQ Level...	Start Date (...)	Expected End Date (...)	Claim Type	Milestone Num...	Amount
SCQE 6	27/05/2026	29/05/2027	Milestone	1	£0.00
SCQE 6	27/05/2026	29/05/2027	Outcome	2	£0.00
SCQE 6	05/07/2026	24/11/2027	Milestone	1	£0.00
SCQE 6	05/07/2026	24/11/2027	Outcome	2	£0.00
SCQE 6	14/04/2026	14/12/2026	Milestone	1	£0.00
SCQE 6	14/04/2026	14/12/2026	Milestone	3	£55.00
SCQE 6	14/04/2026	14/12/2026	Outcome	99	£95.00

- With the view now filtered on the relevant milestone (in this instance, milestone 1) you can open the claim for the required participant by double clicking anywhere in the row, avoiding the blue hyperlinks. The participant can be identified by the first column "Individual". Claims must be made in sequential order for each participant:

Individual	Contract (Deriv...)	Status Reason	Training Provider...	Programme ...	Framework (Derived)	VQ Level...	Start Date (...)	Expected End Date (...)	Claim Type	Milestone Nu...
Test9036 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Engineering (FA)	SCQE 6	08/04/2026	15/12/2026	Milestone	1
Test9039 Indiv...	The Easter Bunny...	Available to Claim	Organisation 33646	FA	Engineering (FA)	SCQE 6	02/04/2026	30/04/2026	Milestone	1

- The example above shows milestone 1 for two unique participants.

2. When the claim record opens, ensure the form view is set to Payment Claim: GA_FA -Training Provider Information Form as this may default to another form view in error:

The screenshot shows a dropdown menu for the form view. The menu is open, displaying a list of options. The option 'GA_FA - Training Provider Information Form' is highlighted with a red rectangle, indicating it is the correct selection. The other options include 'Training Provider Information Form', 'EF - Information', 'EF - Training Provider', 'ITA - Training Provider', 'ITA - Information', 'SERI Training Provider Information Form', 'SERI Information Form', 'GA_FA Information', and 'Information'.

- **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 button:**

The screenshot shows the 'Submission' tab selected in the claim record. The 'Submit Payment Claim' button is visible on the left, and the 'Decline Claim' button is visible on the right. The 'Decline Reason' field is also present.

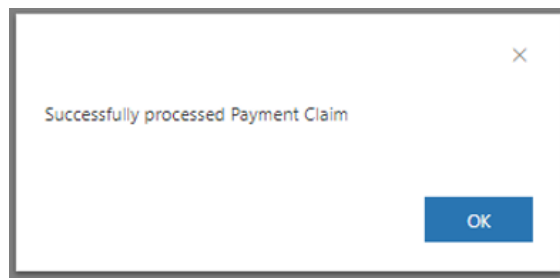
- Decline Claim should only be used when the Provider does not intend to submit the claim at all. Declining claims “skips” the milestone so that the next claim on the IPP can be processed. There is a separate Quick Start Guide that covers declining claims in more detail.

3. A confirmation box will be displayed as part of the claim submission. Read the declaration then click OK to complete the submission. Clicking Cancel will end the process and the claim will not be submitted:

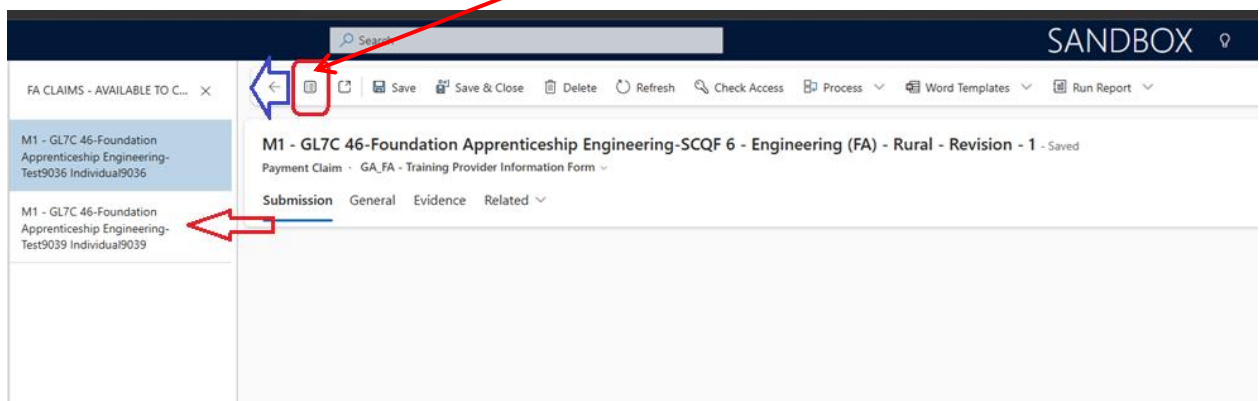
The screenshot shows a 'Confirmation Dialog' box. The dialog contains the text: 'On behalf of the Provider I represent, I confirm that I am authorised to submit this claim. The claim complies with the agreed terms, and all supporting documentary evidence is consistent with Skills Development Scotland'. Below the text are two buttons: 'OK' and 'Cancel'.

- Use the scroll bar to read the declaration in full.

4. When complete, the popup message below will be displayed to confirm that the claim has been submitted successfully. Click on OK to finish:



- The status of the claim will now be updated from Available to Claim to Confirmed and the payment added to the weekly Posting Run ready for payment.
 - If there are any errors / issues with the submission, an error will be returned. Follow the details provided in the message to resolve the issue before resubmitting the claim.
- 5. To access the next claim on the view, use the navigator icon and click into the next participant's milestone. The back arrow can also be used to return to the claim FA Claims – Available to Claim view:



- These steps can now be repeated to process the next claim for the next participant. The claim that has just been submitted will no longer show in the view – only claims at Available to Claim status will be shown.
- 6. For Outcome claims, the same process as above (milestones) should be followed. For Outcome claims to be made, Leaving Details must be entered on the assignment which will set the status of the assignment to “Leaver (Active)”. There is a separate Quick Start Guide that covers how to input leaving details via the Canvas App.

When Outcome claims are processed, an automated check is carried out between FIPS and Qualifications Scotland to verify that the FA has been certificated at the Awarding Body. When certification is confirmed, the claim will go through and show as Confirmed. If certification cannot be confirmed instantaneously, the claim will go to Holding status and reviewed by SDS manually. Once reviewed, the status will update from Holding to Confirmed.

7. Use the saved view and edit it to show the relevant claims when processing the next cohort of claims - filter on the Milestone Number column {2/3/4 etc} and save the changes to the view to show the relevant claims. The view can be filtered on any of the columns e.g. Claim Type. Filtering on “Outcome” will show Outcome claims at Available to Claim status only.
 - Repeat this process for all Milestones and Outcome claims.