

FIPS QUICK START GUIDE

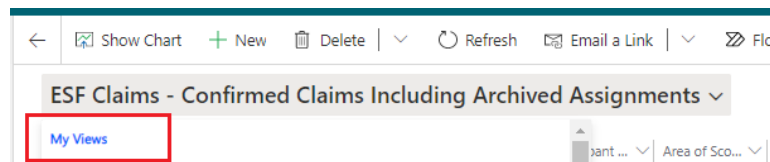
ESF Evidence Upload Guidance for Training Providers

This guidance document will provide details of how Training Providers can manage ESF evidence upload requirements for ESF tagged participants in FIPS using the Payment Claims entity.

1. Training Providers can use the Payment Claims entity in FIPS to manage the ESF evidence upload requirements for ESF tagged participants. Click into the Payment Claims extension on the Workplace menu then use the drop-down to select the view “ESF Claims – Confirmed Claims Including Archived Assignments”:

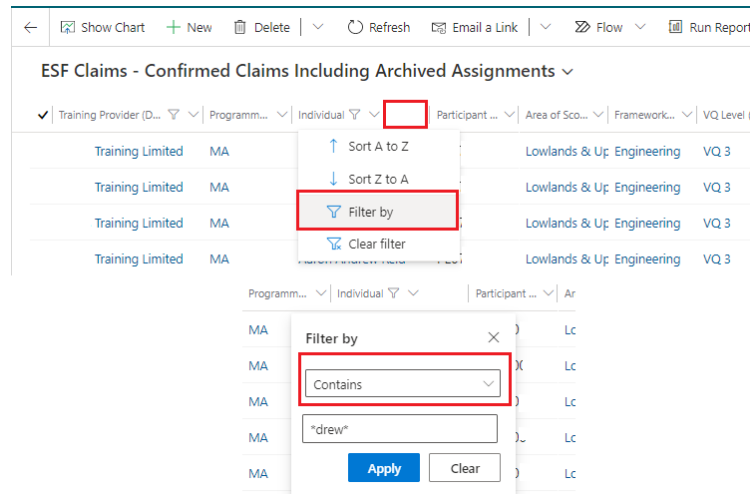
Training Provider	Program	Individual	Participant	Area of Study	Framework	VQ Level	Expected End	Actual End	Claim Type	Status Reason	Amount	Claimed On	ESF Dossier Num.	ESF Project
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up	Engineering	VQ 3	19/03/2022	---	Start Payment	Confirmed Claim	0	£150.00	11/08/2017 1042	Yr 3 - 1518LUP...
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up	Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	1	£430.00	30/11/2017 1822	Yr 3 - 1518LUP...
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up	Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	10	£430.00	30/09/2020 0938	Yr 3 - 1518LUP...
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up	Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	11	£430.00	28/04/2021 1433	Yr 3 - 1518LUP...
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up	Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	2	£430.00	08/03/2018 1453	Yr 3 - 1518LUP...
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up	Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	3	£430.00	10/05/2018 1230	Yr 3 - 1518LUP...
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up	Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	4	£430.00	22/01/2019 1421	Yr 3 - 1518LUP...
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up	Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	5	£430.00	25/02/2019 1653	Yr 3 - 1518LUP...

- This is listed under the My Views section:



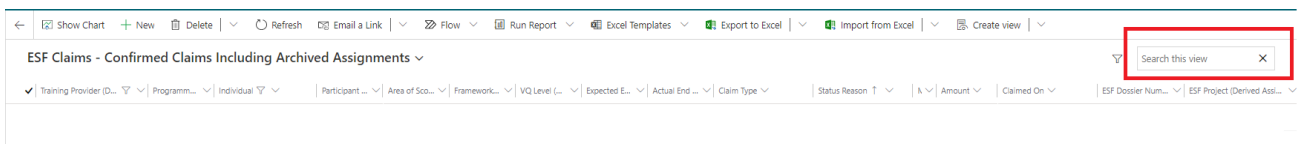
2. This view will display any payment records (claims) at Confirmed status for participants with data in the ESF Dossier Number and the ESF Project fields of their assignment. This view will display the information regardless of the assignment status i.e. it will display results for Confirmed, Leaver Active and Leaver Archived assignments. Evidence for any confirmed claim can be uploaded via this view rather than clicking into the individual’s assignment and accessing the Individual Payment Plan section.

- To find a specific participant to upload evidence for, the filter or search functions can be used to return relevant participant records within the view. To use the filter function, go to individual column header and select the drop-down arrow, then select 'Filter by'. Change option 1 to 'Contains' and in option 2 include the wildcard (* asterisk) and enter the first name of the person you want to filter out:



- this may return more than one participant with the same first name / surname. e.g. anyone that has "Drew" in any part of their name would be returned in this example.

- Alternatively, the 'search this view' function can be used. Input the participant National Insurance Number in the search box and this will bring up all confirmed claims for this participant only:



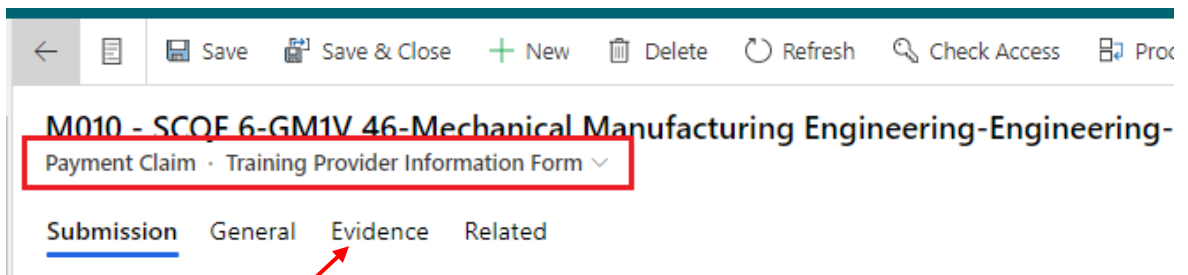
- Once the view has been filtered or searched for the relevant participant, you can now upload the appropriate evidence to each start, milestone, and outcome claim.

- To open the claim record to attach evidence, double click on the record from the view. Click on the white area of the row to open the milestone claim:

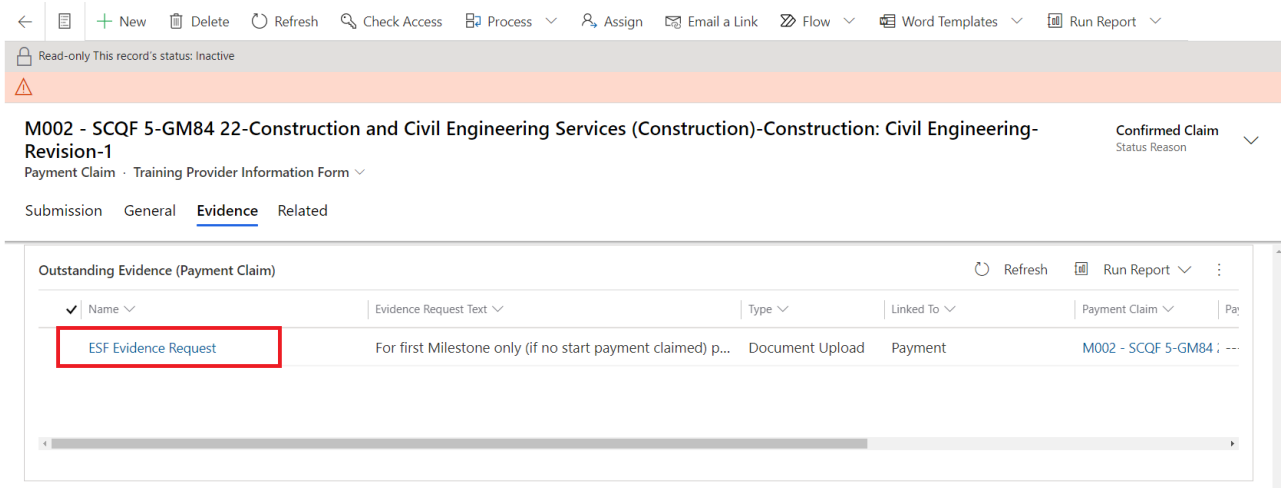
Training Provider (D...)	Program...	Individual	Participant ...	Area of Sco...	Framework...	VQ Level (...)	Expected E...	Actual End ...	Claim Type	Status Reason	Amount	Claimed On	ESF Dossier Num...	ESF Project (Derived Ass...
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up; Engineering	VQ 3	19/03/2022	---	Start Payment	Confirmed Claim	0				
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up; Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	1				
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up; Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	10				
Training Limited	MA	Aaron Andrew	VB55887XX	Lowlands & Up; Engineering	VQ 3	19/03/2022	---	Milestone	Confirmed Claim	11				

- If a hyperlink is clicked (any blue text) this will open a specific record or screen and evidence cannot be uploaded.

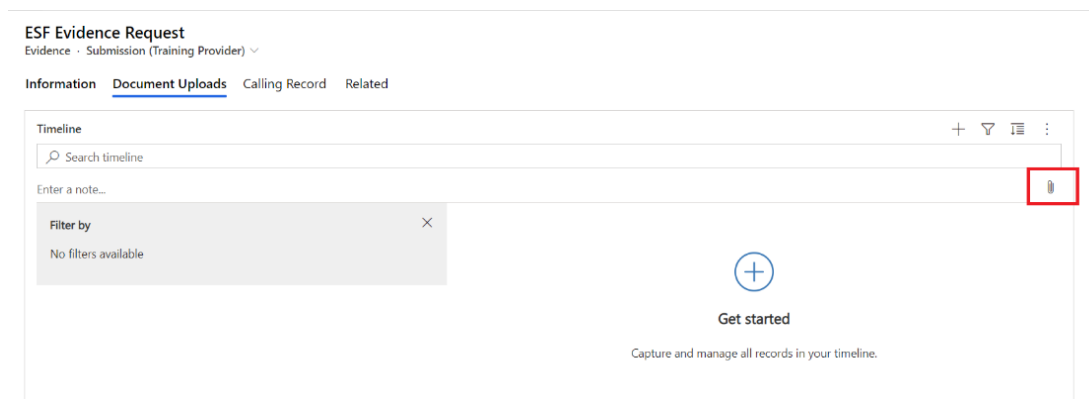
- When the claim opens, ensure the form view is set to “Payment Claim: Training Provider Information Form”:



- Click into the Evidence tab to review the Outstanding Evidence table grid. To access the evidence, upload function, click on the “ESF Evidence Request” hyperlink within the name column:



- The evidence submission view will open. Click into the Information tab to review the requirements and upload guidance. To access the upload wizard function, click into the Document Uploads tab. To attach evidence to the claim for the participant, click on the paperclip icon:



- The upload wizard will appear. Select the relevant document from your computer to attach it. In the notes section, you should clearly name the documents being attached. This will allow the ESF team to cross reference against the list of evidence requirements. Once you have completed the fields for that document, click on the **Add Note** button:

ESF Evidence Request
Evidence - Submission (Training Provider) ▾

Information **Document Uploads** Calling Record Related

Timeline

Search timeline

ESF Progress Review

EXAMPLE ONLY - ESF Progress Review

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ESF Evidence Progress Review.docx X

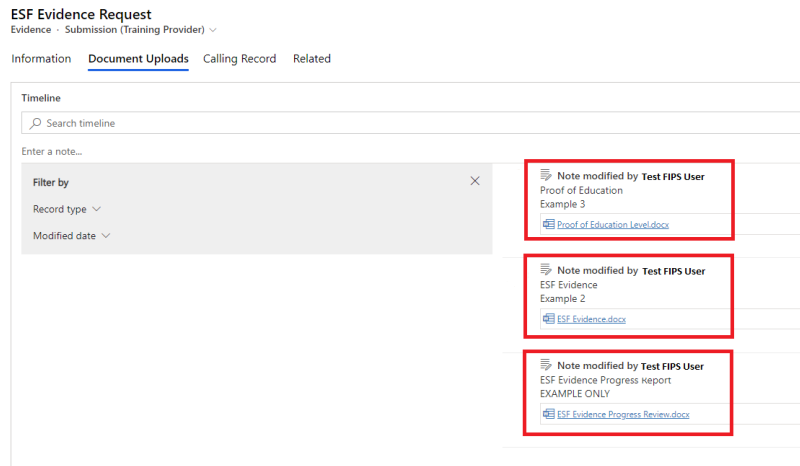
Cancel **Add note**

Filter by
No filters available

+
Get started
Capture and manage all records in your timeline.

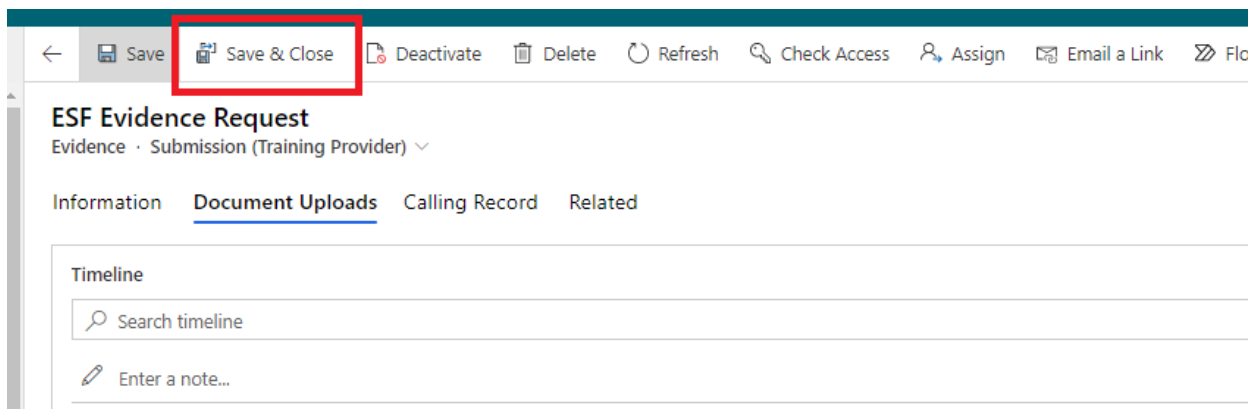
- Please note, multiple documents can be uploaded where required by repeating steps 4-7. **“Add Note” must be clicked each time a document has been selected** to attach the document to the claim successfully. If Add Note is not clicked, the document will not be attached to the claim.
- Please ensure documents are appropriately named. When uploading multiple documents, a different file name for each attachment is required. If attaching the same evidence, or part of the evidence again, ensure the new file name is different to the original document uploaded. The system may overwrite existing evidence if the same file name is used on the new upload.

8. Details of all evidence that has been attached against a claim will be displayed in the Timeline grid. The uploads should be reviewed to ensure all evidence has been successfully uploaded:



- To view a document, click on the hyperlink. In this example, 3 documents have been uploaded and named and these are highlighted in the red boxes in the screenshot above.

9. That completes the evidence upload process. These steps can be repeated to attach evidence to other payments claims for the same participant / other participant records. Click on Save & Close on the top ribbon bar:



- This will close the evidence upload section for that claim and you will be returned to the claim record. If you have evidence to attach to other claim records for that participant, the Record List button can be used to quickly navigate between claim records:

The screenshot shows a web application interface. On the left, there is a list of claim records under the heading 'ESF CLAIMS - CONFIRMED CLAIMS'. The records are:

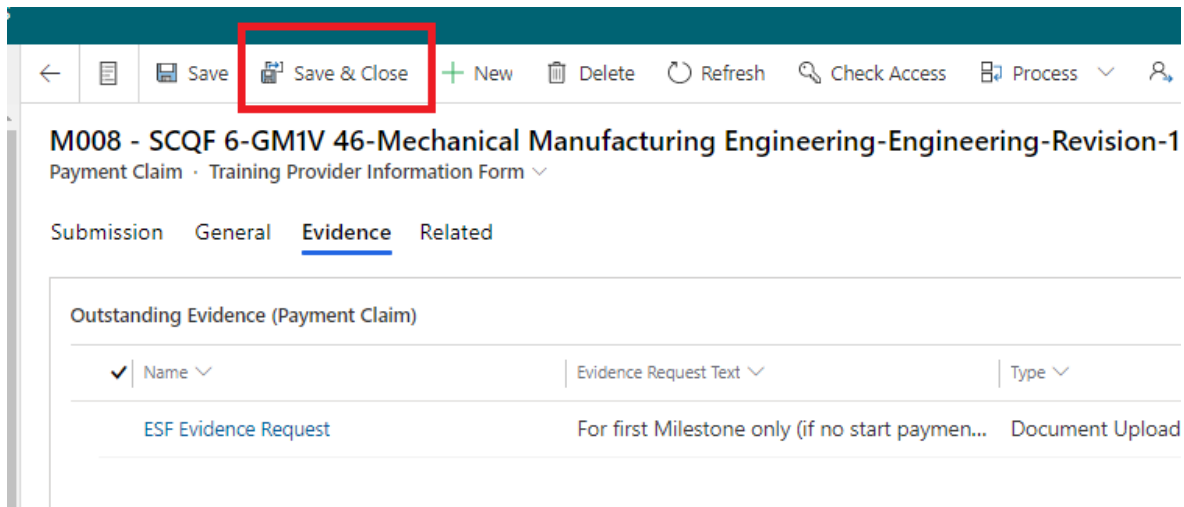
- M00 - VQ 3-GL2M 23-Engineering Maintenance-Training Limited
- M01 - VQ 3-GL2M 23-Engineering Maintenance-Training Limited
- M010 - VQ 3-GL2M 23-Engineering Maintenance-**
- M011 - VQ 3-GL2M 23-Engineering Maintenance-training Limited
- M02 - VQ 3-GL2M 23-Engineering Maintenance-Training Limited

The main view displays the details for 'M010 - VQ 3-GL2M 23-Engineering Maintenance-Engineering-Revision-2'. The top navigation bar includes buttons for 'New', 'Delete', 'Refresh', 'Check Access', 'Process', 'Assign', 'Email a Link', and 'Flow'. A red box highlights the 'New' button. A red arrow points from the 'New' button to the list of records on the left. The main view shows a 'Payment Claim' with a 'Training Provider Information Form' and tabs for 'Submission', 'General', 'Evidence', and 'Related'. The 'Evidence' tab is active, showing 'Outstanding Evidence (Payment Claim)' with a table:

Name	Evidence Request Text	Type	Linked To
ESF Evidence Request	Please upload a completed SOAR or Mil...	Document Upload	Paymer

- This function enables users to click between claim records using the panel view. The results in the view contain records for what was filtered on originally e.g. claims for a specific participant name or NI number.

10. Otherwise click on Save & Close or the back arrow within the claim record to return to the view “ESF Claims – Confirmed Claims Including Archived Assignments”:



- Training Providers can use this view to work through evidence uploads for all ESF tagged participants. Please note, once uploaded, the claim record / number will not be removed from this view as it is setup to capture all ESF participants regardless of the status of the evidence upload (e.g. whether it's Satisfied or Outstanding). This means the view will display payment claim records for participants that have had evidence uploaded and those that have not yet had evidence attached.