

FIPS Quick Start Guide

How to Hold and Undo Milestone and Outcome Claims

Providers can hold and undo Milestone and Outcome claims to delay payment or to undo payments in FIPS. Claims can set to holding and undone while pre-posting (status of Ready to Send to Finance) and claims can be undone after being posted for payment, when the status is Sent to Finance. For any other claim types that require to be undone e.g. Expense Claims, requests should be raised using the User Requests function in FIPS for SDS action.

- Use the link icon below to access the FIPS landing page on the SDS corporate website which contains additional FIPS guides and user information.



Guide last reviewed: 31/10/2025

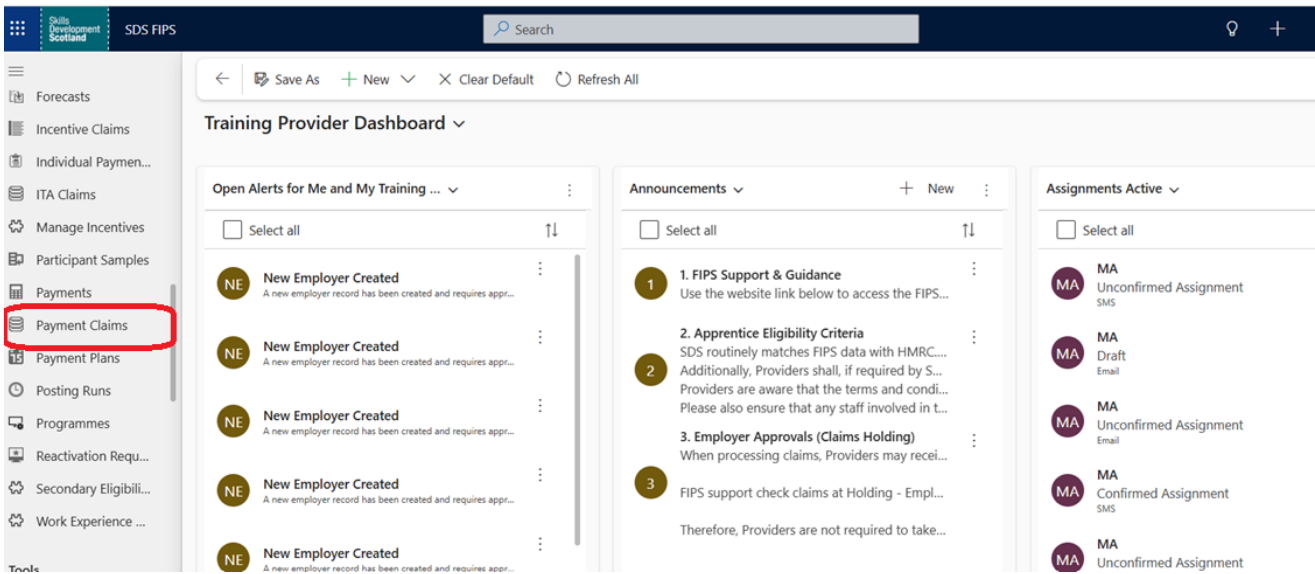
Next review due: 31/01/2027

Created by FIPS Support Team

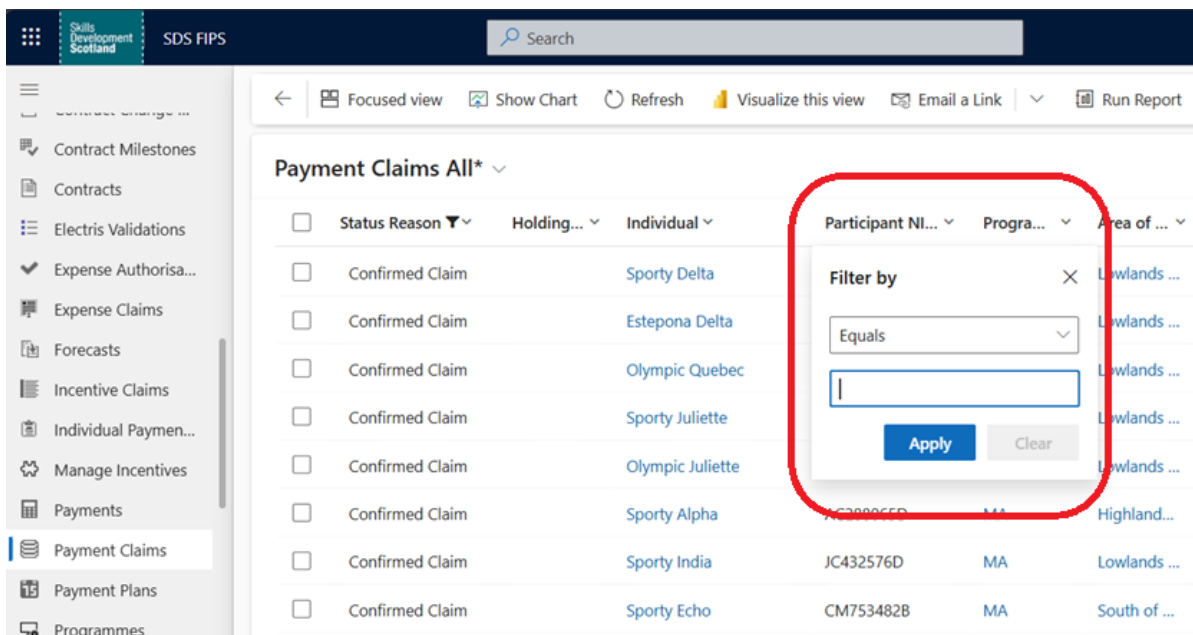
Undoing Claims

- Milestone and Outcome claims can be undone by Providers. Claims can be undone prior to payment being made (status Ready to Send to Finance), or after payment has been made (status of Sent to Finance). To undo a claim that's pre-posting, this can be done via the Payments entity using the "Initiate Undo Related Record Process" button. For payments that have been processed by SDS finance (status of Sent to Finance), claims must be undone via the Payment Claims entity.

1. Milestone and Outcome claims be undone within an assignment IPP or from within the Payment Claims entity. To undo a claim from the Payment Claims entity, scroll down to the Payment Claims extension on the Workplace menu:



- Undoes can only be processed for claims at Confirmed / Unconfirmed status. Pending / Undone etc cannot be undone. Use the view to find the milestone or outcome claim required to be undone. Use the filtering options to filter the records on NI number or individual name:

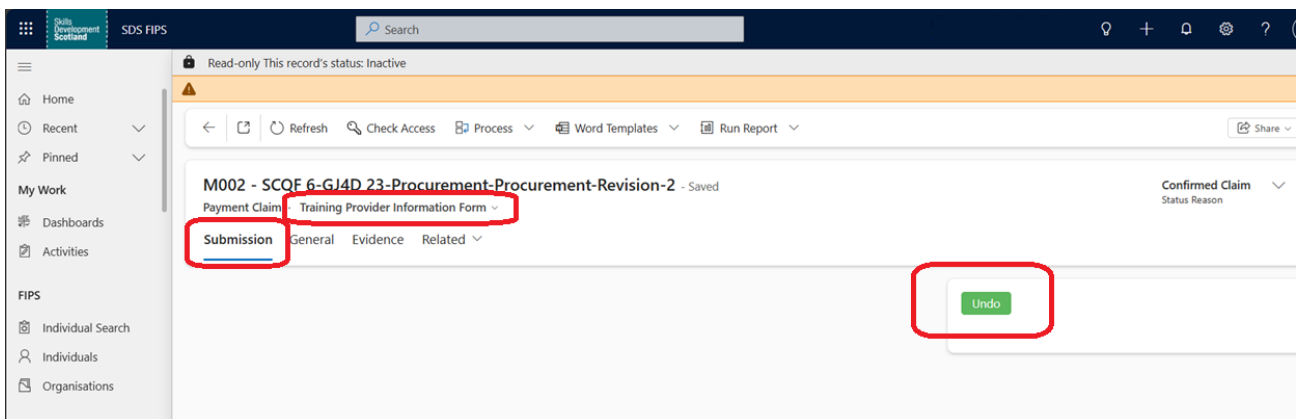


- Scroll along to review the details in the view and ensure the claim you select is accurate – check the Claim Type, Amount and Milestone Number. Double click to open the claim record:

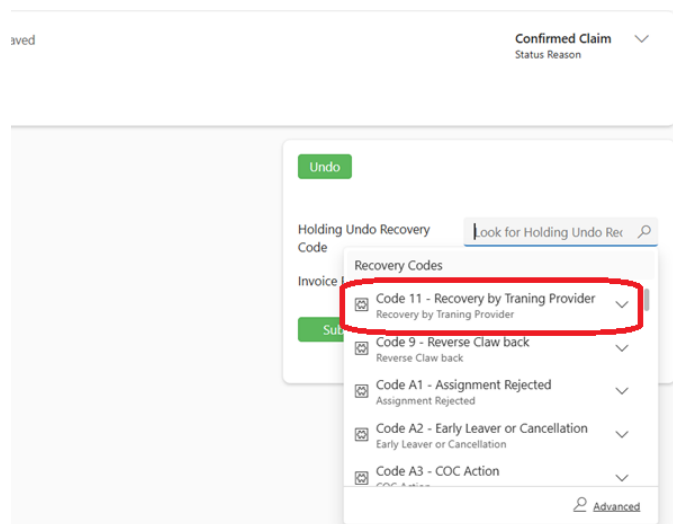
Status Reason	Holding ...	Individual ↑	Particip...	Pr...	Area of ...	Occupat...	Framew...	VQ Leve...	Start Da...
Confirmed Claim		Quebec Sporty	ZC052999B	MA	Lowlands ...	Other Ser...	Procurem...	SCQF 6	26/08/2024
<input checked="" type="checkbox"/>		Quebec Sporty	ZC052999B	MA	Lowlands ...	Other Ser...	Procurem...	SCQF 6	26/08/2024
Confirmed Claim		Quebec Sporty	ZC052999B	MA	Lowlands ...	Other Ser...	Procurem...	SCQF 6	26/08/2024
Confirmed Claim		Sporty Alpha	AC28806...	MA	Highland...	Animal C...	Veterinar...	SCQF 7	26/08/2024
Confirmed Claim		Sporty Delta	RG591488B	MA	Lowlands ...	Engineeri...	Engineeri...	SCQF 6	26/08/2024
Confirmed Claim		Sporty Echo	CM75348...	MA	South of ...	Engineeri...	Engineeri...	SCQF 6	26/08/2024

- ✓ This can also be accessed via the participant Assignment, within the Individual Payment Plan tab.

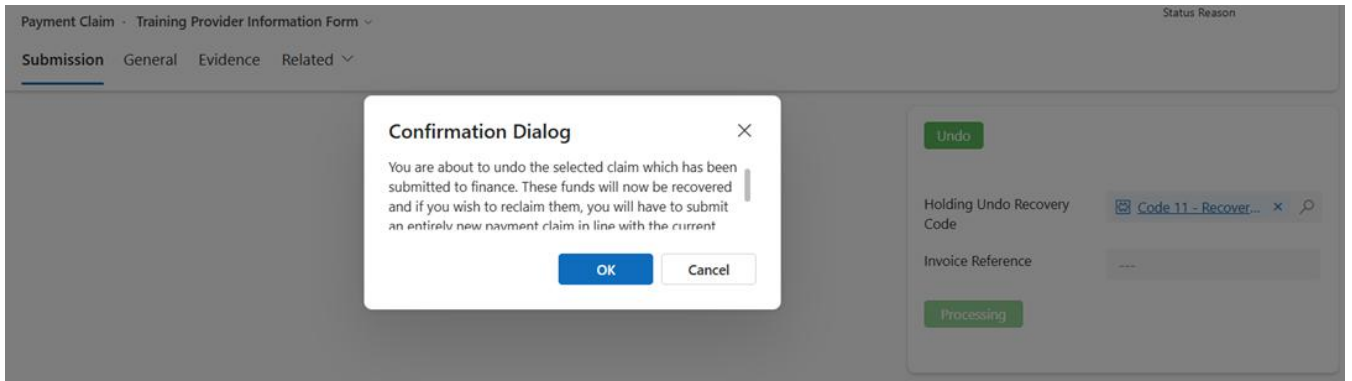
- When the claim form opens, ensure the view is set to **Training Provider Information Form**. Click into the Submission tab and the Undo button will be displayed:



- To undo the claim which will create an undo record and return the funds to SDS, click on Undo. Two new fields will appear: **Holding Undo Recovery Code** and **Invoice Reference**. Select the code “**Recovery by Training Provider**” from the list:

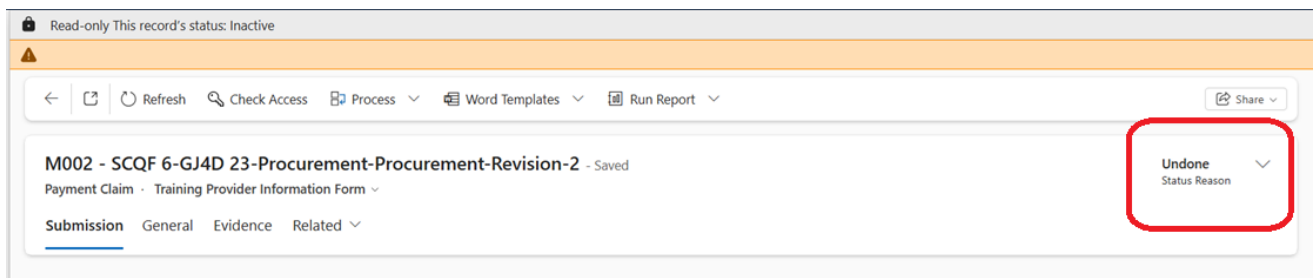


- The Invoice Reference field is not mandatory and can be left blank. Click on Submit to undo the claim. Review the confirmation dialogue and click on OK to complete the undo process:



Claims must be undone in sequence. If multiple claims are to be undone e.g. milestone 2 and 3, milestone 3 must be undone before milestone 2. If milestone 2 is attempted to be undone while the status of milestone 3 is Confirmed / Unconfirmed, an error will be returned when the undo is attempted, and the claim will not be undone. If claims are undone in error, this cannot be reversed. The claim(s) will need to be resubmitted in full.

- The screen will refresh, and the status of that claim will now show as Undone:



- A negative value relating to the claim will be added to the posting run – this transaction can be viewed within the Payments entity on the workplace menu.

Claims can be undone in the same way by clicking into the participant assignment and accessing the milestone / outcome via the Individual Payment Plan tab. The steps to complete the undo action are the same as those described above.

Holding Claims

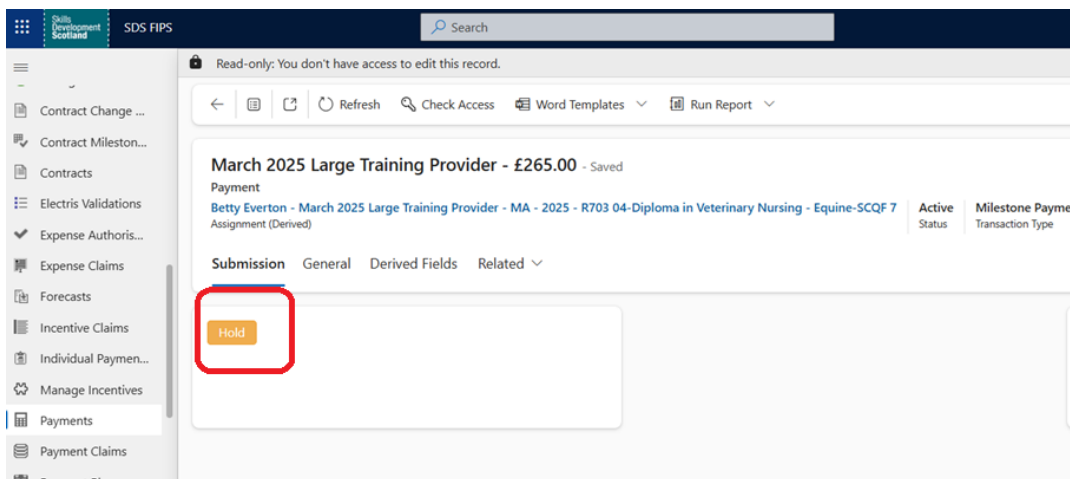
- Providers can manually hold claims that have been submitted in FIPS but not yet paid out. Doing this will delay payment until the claim(s) is taken off holding – Providers have access to unhold payments via the Payments entity.

1. To hold a payment that has not yet been processed by SDS finance as part of the weekly posting run, click into the Payments entity on the workplace menu. The default view is Payments – Pre-Posting view. If another view has been set as the default, use the drop-down to select the Pre-Posting view. A list of claims submitted that week will be displayed, and the status reason will show as “Ready to Send to Finance”. Only claims at this status can held.

Status Reason	Training Provider	Amount	Progra...	Participant Name	Nationa...	Transaction Type	Paymen...	Clai
Ready to Send to Finance	September 2025 Training Team	-£1,275.00	MA	Debbie Chelsea	OC08085...	Outcome Payment	M099 - S...	
Hold	September 2024 Test Training	-£439.00	MA	Olympic Quebec	XG4457958	Milestone Payment	M001 - S...	
Hold	March 2025 Large Training Provider	£100.00	MA	Alan Fulham	WP47515...	Milestone Payment	M001 - S...	
Hold	September 2024 Test Training	-£506.00	MA	Quebec Sporty	ZC0529998	Milestone Payment	M002 - S...	
Hold	September 2024 Test Training	-£150.00	MA	Sporty Juliette	WX95301...	Start Payment	M000 - S...	
Hold	March 2025 Large Training Provider	£265.00	MA	Betty Everton	JN054400D	Milestone Payment	M005 - S...	
Hold	September 2025 Training Team	-£506.00	MA	Ally McCoist	ER624715A	Milestone Payment	M003 - S...	
Hold	September 2025 Training Team	-£506.00	MA	Ally McCoist	ER624715A	Milestone Payment	M004 - S...	

- Click into the claim by double clicking on the record.

2. When the record opens, click on the Hold button:



- When clicked, the screen will refresh and the Un-hold button will be visible. When a claim has been set to Holding in this way, it will not be included in the weekly posting run and payment will not be made until it is set back to Ready to Send to Finance status by clicking on the Un-Hold button.

- To change the status from Holding to Ready to Send to Finance, click on Un-Hold:

Read-only: You don't have access to edit this record.

← Refresh 🔍 Check Access 📄 Word Templates ⌵ 📊 Run Report ⌵

March 2025 Large Training Provider - £265.00 - Saved

Payment

Betty Everton - March 2025 Large Training Provider - MA - 2025 - R703 04-Diploma in Veterinary Nursing - Equine-SCQF 7 Assignment (Derived) Active Status Milestone Payment Transaction Type ⌵

Submission General Derived Fields Related ⌵

Un-Hold

- The screen will refresh, and the status will be updated. The payment will be picked up during the weekly posting run.

- ✓ Claims can be undone by Providers at any status – Ready to Send to Finance and Sent to Finance.
- ✓ Claims can be held to delay payment (status of Holding) using the Payments entity in FIPS when the status is Ready to Send to Finance. Users must un-hold claims in order to receive payment.