

FIPS QUICK START GUIDE

Updating Expected End Dates & Expected Claim Dates

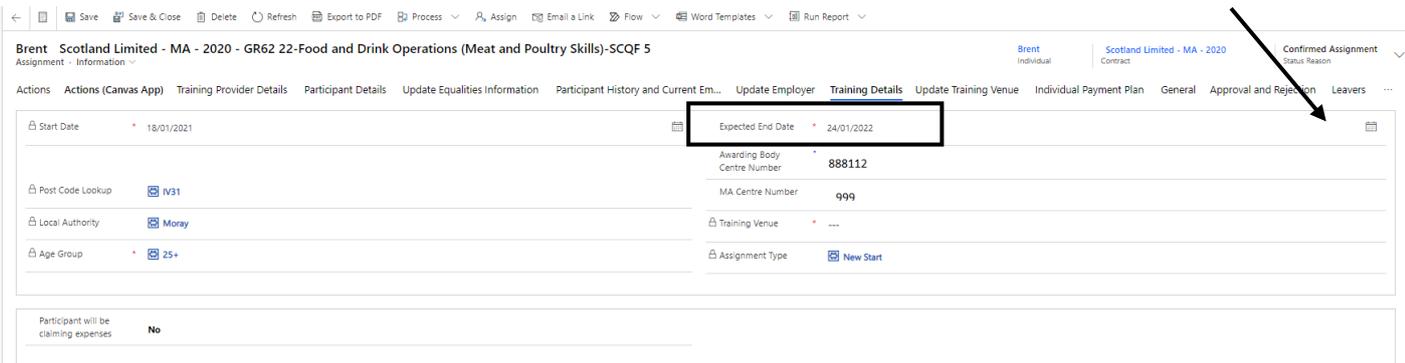
This guide will cover how to make changes to Expected End Dates of assignments and how to update Expected Claim Dates for Milestones and Outcome claims on an MA assignment.



This is covered in a video guide. To view this, click the play button.

Expected End Dates

1. To make changes to Expected End Dates and Expected Claim Dates of milestones and outcome claims in FIPS, click into the relevant assignment for a participant. Assignments can be found within the Assignments entity on the Workplace menu. To open, double click on the assignment that requires the change.
2. To update the Expected End Date of an 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:



3. When the change has been made, the assignment must be saved. Click on “Save” at the top of the menu ribbon 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. This date must be kept up to date and amended as required.

Milestone / Outcome Claims Expected Claim Dates

1. To update an Expected Claim Date for a milestone or outcome, 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.
2. The current Expected Claim Date is shown within the IPP table grid. To amend the date, double click on the relevant claim to open the claim screen:

Claim Type	Milestone Number	Amount	Expected Claim Date	Claimed On	Status Reason
Milestone	1	£188.00	19/04/2021	---	Available to Claim
Milestone	2	£188.00	19/07/2021	---	Available to Claim
Milestone	3	£188.00	18/10/2021	---	Available to Claim
Milestone	4	£188.00	17/01/2022	---	Available to Claim
Outcome	99	£748.00	24/01/2022	---	Available to Claim

- In this example, milestones 1-4 and the Outcome are at Available to Claim status. Milestone 1 will be updated to a new Expected Claim Date. Double click anywhere on the row to open the claim details.

3. When the claim screen opens, ensure the view is set to Training Provider Information Form. Click into the General tab to access the Expected Claim Date field. Expected Claim Dates cannot be amended in bulk and must be edited separately for each claim:

M001 - SCQF 5-GR62 22-Food and Drink Operations (Meat and Poultry Skills)-Food and Drink Operations-Revision-1

Payment Claim: Training Provider Information Form

Submission: **General** Evidence Related

Name: M001 - SCQF 5-GR62 22-Food and Drink Operations (Meat and Poultry Skills)-Food and Drink Operations-Revision-1

Owner: Scotland Limited

Individual Payment Plan: Brent Scotland Limited - MA - 2020 - GR62 22-Food and Drink Operations (Meat and Poultry Skills)-SCQF 5

Claim Type: Milestone

Milestone Number: 1

Claim From: 18/01/2021

No of Units: 1

Expected Claim Date: 19/04/2021

Claimed On: ---

Amount: £188.00

Holding Reason: ---

SIA Approval Required: No

Clawback: No

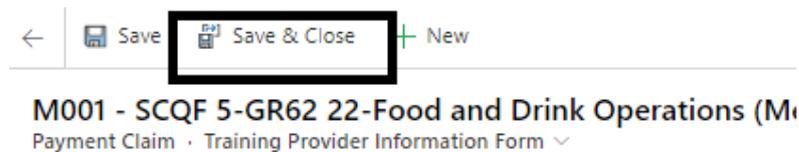
- Click into the field to edit the date. The calendar will be displayed and the new date can be selected using this or by manually entering the relevant date using the DD/MM/YYYY format:

Claim Type	* Milestone
Milestone Number	* 1
Claim From	* 18/01/2021
No of Units	1
Expected Claim Date	---
Claimed On	---
Amount	*
Holding Reason	
SIA Approval Required	
Clawback	No

January 2021 ↑ ↓ 2021 ↑ ↓

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

- When the change has been made, the record must be saved. Click on Save & Close from the top menu ribbon to return the assignment IPP view:



- The new date will now be displayed within the IPP payment table:

Total Value	£1,500.00				
Last updated:	Not Available				
Payment Claims					
<input type="button" value="Refresh"/> <input type="button" value="Run Report"/> <input type="button" value="Excel Templates"/> <input type="button" value="Export Payment Claims"/>					
Claim Type	Milestone Number	Amount	Expected Claim Date	Claimed On	Status Reason
Milestone	1	£188.00	08/03/2021	---	Available to Claim
Milestone	2	£188.00	19/07/2021	---	Available to Claim
Milestone	3	£188.00	18/10/2021	---	Available to Claim
Milestone	4	£188.00	17/01/2022	---	Available to Claim
Outcome	99	£748.00	24/01/2022	---	Available to Claim

Payment Claim Evidence

- In this example, the Expected Claim Date of milestone 1 has been updated to 08/03/2021.

- Repeat the process as required for any other milestones or the outcome on the IPP. The dates must follow a sequential pattern. Training Providers should review the Expected Claim Date prior to submitting claims and update if required. If the Outcome Expected Claim Date is changed, the assignment Expected End Date will be auto updated to match the outcome claim date.