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:

ent Scotland Lim	ited - MA - 2020 - GR62 22-F	Food and Drink	Operations (Meat and Pou	ıltry Skills)-SCQF 5		Brent Individual	Scotland Limite Contract	d - MA - 2020	Confirmed Status Reaso	ned Assignment lason		
ons Actions (Canva	s App) Training Provider Details	Participant Details	Update Equalities Information	Participant History and Current	Em Update Employer	Training Details	Update Training Venue	e Individual P	ayment Plan G	eneral Approva	l and Rejection	Leavers
ੇ Start Date	18/01/2021				Expected End Date *	24/01/2022					-	
					Awarding Body Centre Number	888112						
Post Code Lookup	💭 IV31				MA Centre Number	999						
Local Authority	🖾 Moray				A Training Venue							
Age Group	✿ 25+				Assignment Type	🖾 New Start						
Participant will be												

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: ,

				nt Plan	Individual Payment Pla
1	/			8	No of Units
	/			Not Available	ast updated:
				£0.00	otal Paid
	/			Not Available	ast updated:
	/			£1,500.00	otal Value
				Not Available	Last updated:
	/			Not Available	Last updated: Payment Claims
O Refresh		Amount V	Miletrona Number V	Not Available	ayment Claims
C Refresh III Run Report III Escel Tempates III Esport Reymen opecad Daim Day 1 Calimed Da Same Reson offcd/2011 Same Reson </td <td> Epucied Claim Se/↑ ∨ </td> <td>Ansurt V</td> <td>$_{\rm Milestone Number} \sim$</td> <td>Not Available</td> <td>ast updated: nyment Claims ✓ Claim Type ✓ Milestone</td>	Epucied Claim Se/↑ ∨ 	Ansurt V	$ _{\rm Milestone Number} \sim$	Not Available	ast updated: nyment Claims ✓ Claim Type ✓ Milestone
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C Refresh Ell Run Report III Escel Tempates III Esport Reymen gested Daim Spit Calimed Div Status Reason V Status Reason V 90/4/2021 Available to Claim Available to Claim Available to Claim Available to Claim Available to Claim		Amont ~ 1 2 3	Miletone Number V	Not Available	ast updated: syment Claims Claim Type \leftyme Milestone Milestone Milestone
C) Refesh Ell Run Report V 48 Excel Templates V 41 Export Paymen pesad Dam Dat V Caumed Da V Stans Reason V 2004/2021 Available to Claim 40/0/2021 Available to Claim 40/0/2021 Available to Claim		Amore ~ 1 2 3 4	Milatora Numbar 🗸	Not Available	ast updated: upment Claims ✓ Claim Type ∨ Milestone Milestone Milestone

- 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:

← 🕞 Save 🛱 Save &	Close 🕂 New 📋 Delete 🖒 Refresh 🗟 Export to PDF 🚯 Process 🗸 🗛 Assign 🔯 Email a Link 🌠 Flow 🗸 🦉 Word Templates 🗸 🗐 Run Report 🗸	
M001 - SCQF 5-GR6 Payment Claim Training P	2.22-Food and Drink Operations (Meat and Poultry Skills)-Food and Drink Operations-Revision-1 revider Information Form	Available to Claim Status Reason
Submission General	Evidence Related	
🖰 Name	M001 - SCQF 5-GR62 22-Food and Drink Operations (Meat and Poultry Skills)-Food and Drink Operations-Revision-1	
A Owner	• M Scotland Limited	
A Individual Payment Plan	a Brent Scotland Limited - MA - 2020 - GR62 22-Food and Drink Operations (Meet and Poultry Skills)-SCQP 5	
🗄 Claim Type	* Miestone	
A Milestone Number	* 1	
🛆 Claim From	* 18/01/2021	Ē
🔒 No of Units	1	
Expected Claim Date	* 19/04/2021	
A Claimed On		
S Amount	* £186.00	
A Holding Reason	м	
SIA Approval Required	No	
🛆 Clawback	No	

4. 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	*	Mile	ston	ne								
🔒 Milestone Number	*	1										
A Claim From	*	10/0	1 /20	121								
		10/0	1/20	121								
A No of Light												
LI NO OF OMILS		1										
Expected Claim Date	1											
		Jar	nuar	y 202	21		\uparrow	\downarrow	2021			$\land \downarrow$
A Claimed On		Su	Мо	Tu	We	Th	Fr	Sa	120	Eala	Mar	Amr
		27	28	20	20	21	1	2	2411	160	ivial	API
0		21	20	29	50	21		2				
~s Amount		3	4	5	6	7	8	9	May	Jun	Jul	Aug
0		10	11	12	13	14	15	16				
Holding Reason		17	18	19	20	21	22	23	500	0.4	New	Dec
0		24	25	26	27	28	20	30	Seb	Utt	1400	Dec
SIA Approval				20								
Required		31	1	2	3	4	5	6				
A Clawback												
LI CIUMDUCK		No										

- 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:



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

Total Value	£1,500.00					
Last updated:	Not Available					
Payment Claims						
					🔿 Refresh 🔳 R	un Report \lor – 🙀 Excel Templates \lor – 🕼 Export Payment Claims \mid \lor
✓ Claim Type $∨$		Milestone Number \backsim	Amount \checkmark	Expected Claim Date \uparrow \checkmark	Claimed On \checkmark	Status Reason \checkmark
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 Evider	nce					

- In this example, the Expected Claim Date of milestone 1 has been updated to 08/03/2021.
- 6. 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.