

FIPS QUICK START GUIDE

How to Process a Milestone / Outcome Claim

This guide will cover how to process milestone and outcome claims for participants in FIPS. This process will be demonstrated for an MA assignment, but the process is the same across programmes. Milestone claims must be made on an individual basis and cannot be processed in bulk.



This is also covered in a guidance video. To view, click on the play button.

- To Process a milestone/outcome claim, go to the Assignments entity, and open the assignment for the relevant participant. When the assignment opens, click into the Individual Payment Plan (IPP) tab to view the details of the IPP:**

Claim Type	Milestone Number	Amount	Expected Claim Date	Claimed On	Status Reason
Milestone	1	£188.00	22/04/2021	---	Available to Claim
Milestone	2	£188.00	22/07/2021	---	Available to Claim
Milestone	3	£188.00	21/10/2021	---	Available to Claim
Milestone	4	£188.00	20/01/2022	---	Available to Claim
Outcome	99	£748.00	27/01/2022	---	Available to Claim

- Depending on your zoom/magnification settings some tabs may be added to the ellipsis ...

In this example, the individual has 4 milestones and an outcome claim outstanding on the IPP.

- The Registrations section within the IPP must have the fields set to Yes before claims can be processed (MA Only). These fields will be set to No by default, until changed by the Training Provider:**

Field	Value
Sector Skills Council Registered	No
Awarding Body Registered	No

- To set the fields to Yes, click into the field where it says “No” and select Yes.
- If the fields show as No, claims cannot be made. An error will be returned when a claim submission is attempted.

To submit a claim, double click on the relevant claim number to open the submission screen. Claims must have the status reason of Available to Claim – any other status will mean the claim cannot be submitted:

Claim Type	Milestone Number	Amount	Expected Claim Date	Claimed On	Status Reason
Milestone	1	£188.00	22/04/2021	---	Available to Claim
Milestone	2	£188.00	22/07/2021	---	Available to Claim
Milestone	3	£188.00	21/10/2021	---	Available to Claim
Milestone	4	£188.00	20/01/2022	---	Available to Claim
Outcome	99	£748.00	27/01/2022	---	Available to Claim

Payment Claim Evidence

- Claims must be submitted in sequential order
- Highlighted in the screenshot above is milestone 1 – double click where highlighted to open the claim record

If the Status Reason of the claims show as Pending, raise a ticket within User Request Handling (URH) to the FIPS Support Team for assistance.

3. When the submission screen opens, ensure the form view is set to Payment Claim: Training Provider Information Form:

The screenshot shows the submission interface for a claim. The 'Submission' dropdown menu is open, and 'Training Provider Information Form' is highlighted. Other options include 'EF - Information', 'EF - Training Provider', 'ITA - Training Provider', 'ITA - Information', 'SERI Training Provider Information Form', 'SERI Information Form', 'GA Information', and 'GA - Training Provider Information Form'. A 'Submit Pay' button is visible on the left, and a 'Decline Claim' button is on the right.

4. Within the General tab, the Expected Claim Date of the milestone can be updated prior to the claim being submitted if required. This date cannot be prior to the previous claimed on date:

The screenshot shows the 'General' tab of the submission screen. The 'Expected Claim Date' field is highlighted with a black box and contains the value '22/04/2021'. Other fields include Name, Owner (Scotland Limited), Individual Payment Plan, Claim Type (Milestone), Milestone Number (1), Claim From (21/01/2021), No of Units (1), Claimed On (---), Amount (£188.00), Holding Reason (---), SJA Approval Required (No), and Clawback (No).

- 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:

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

Submit Payment Claim Decline Claim

- Decline Claim should only be used when the Training 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.

5. Select the evidence date of the claim then click Submit Date:

M002 - SCQF 6-GL2M 23-Engineering Maintenance-Engineering-Revision-1
 Payment Claim · Training Provider Information Form

Submission General Evidence Related

When was evidence approved for this claim *

Submit Date

January 2021							2021			
Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb	Mar	Apr
27	28	29	30	31	1	2				
3	4	5	6	7	8	9	May	Jun	Jul	Aug
10	11	12	13	14	15	16				
17	18	19	20	21	22	23	Sep	Oct	Nov	Dec
24	25	26	27	28	29	30				
31	1	2	3	4	5	6				

6. The screen will refresh. Enter the relevant mandatory fields then click Submit to process the claim:

M002 - SCQF 6-GL2M 23-Engineering Maintenance-Engineering-Revision-1
 Payment Claim · Training Provider Information Form

Submission General Evidence Related

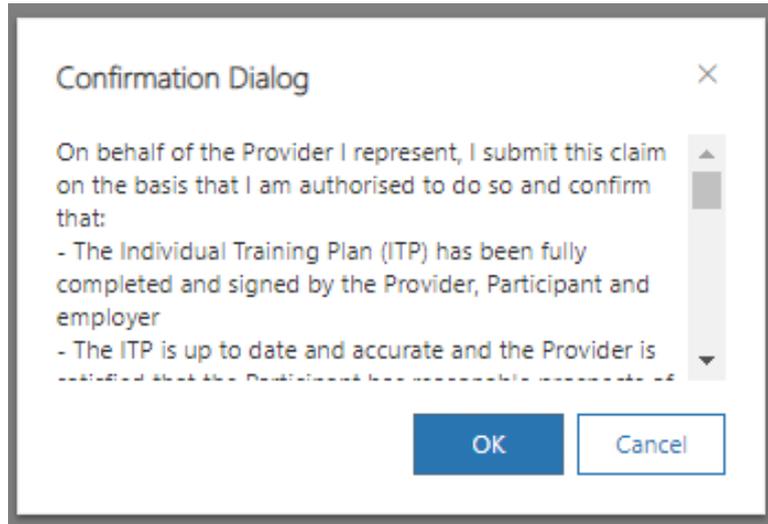
Name of assessor / reviewer that signed off claim * Test Example Person

Job title of assessor / reviewer that signed off claim evidence * Test Example Job Title

What is the evidence type for this claim * QPR

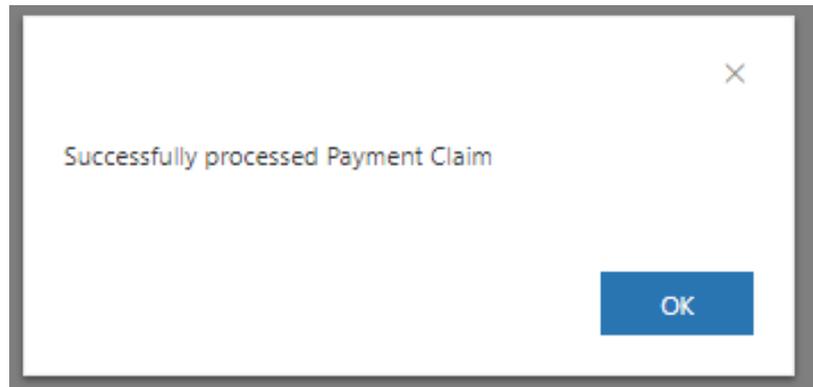
Submit

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



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

8. When complete, a message is displayed to confirm if the payment has been submitted successfully. Click on OK to finish. The claim will now show as Unconfirmed:



- 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.

9. The claim will now show as Unconfirmed on the IPP. Claims are picked up for processing by SDS finance every Friday:

Payment Claims						
Claim Type	Milestone Number	Amount	Expected Claim Date	Claimed On	Status Reason	
Milestone	1	£250.00	31/07/2020	---	Declined	
Milestone	2	£250.00	29/10/2020	22/01/2021 10:28	Unconfirmed Claim	
Milestone	3	£250.00	28/01/2021	22/01/2021 10:28	Unconfirmed Claim	

- Validation messages for claims do not get sent out on the day a claim is made. The validation process for claims begins on a Friday - please refer to the validation quick start guide for more information.
- Any claims submitted will be displayed within the Payments entity on the Pre-Posting view which will show all claims made that week

10. For Outcome claims, the exact same process as above (milestones) should be followed. For Outcome claims to be made, Leaving Details must be entered on the assignment and the status of the assignment at “Leaver (Active)”. There is a separate guidance document that covers how to input leaving details – refer to “Entering and Updating Leaving Details”.

Training Providers should now read the validation guide which covers the next stage of the claim submission process - claim validation.