

## **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.

1. 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:

$\leftarrow$	Ξ	🔛 Save	💕 Save & Close	Delete	C Refresh	Export to PDF	🛿 Process 🗸	A, Assign	🕼 Email a Link	🔊 Flow 🗸	🖷 Word Templates 🗸 🗸	🗐 Run Report 🗸

Andrea - Scotland I Assignment · Information ~	imited - MA - 2020 - GR62	22-Food and Dri	nk Operations (Meat and	Poultry Skills)-SCQF 5			And: Indivi	rea Scotland L dual Contract	mited - MA -	2020	Confirmed Status Reaso	Assignment	· ~
Actions Actions (Canvas	App) Training Provider Details	Participant Details	Update Equalities Information	Participant History and Current Em.	Update Employer	Training Details	Update Training Venue	Individual Payment Plar	General	Approval and I	Rejection	Leavers	
Registrations													
Sector Skills Council Registered	No												
Awarding Body Registered	No												
Active Individual Payment Plan	Andrea - Scotland Limited - N	MA - 2020 - GR62 22-Fool	d and Drink Operations (Meat and Pou	Itry Skills)-SCQF 5									
Individual Payment Pla	n												
No of Units	8												
Last updated:	Not Available												
🔟 Total Paid	£0.00												
Last updated:	Not Available												
🗄 Total Value	£1,500.00												
Last updated:	Not Available												
Payment Claims							🔿 Refresh	🗐 Run Report 🗸 🖷	ixcel Templat	es 🗸 🖪 Expor	t Payment C	aims   🗸	
✓ Claim Type ∨	5	/ilestone Number $\smallsetminus$	Amount $\lor$		Expected Claim Date ↑ 🗸		Claimed On $\checkmark$		Status Reason	1 V			
Milestone			1	£188.00	22/04/2021				Available t	o Claim			
Milestone			2	£188.00	22/07/2021				Available t	o Claim			
Milestone			3	£188.00	21/10/2021				Available t	o Claim			
Milestone			4	£188.00	20/01/2022				Available t	o Claim			
Outcome			99	£748.00	27/01/2022				Available t	o 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.

2. 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:

1	Actions Actio	ons (Canvas App)	Training Provider Details	Participant Details	Update Equalities Information	Participant History and Current Em	Update Employer	Training Details	Update Training Venue	Individual Payment Plan
	Registrations	s								
	Sector Skills Registered	Council No								
	Awarding Bo Registered	ody 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:

				🖒 Refresh 🔳 Run Report 🗸 🖷 I	Excel Templates $\lor$ 📲 Export Payment Claims $ $ $\lor$
✓ Claim Type ∨	Milestone Number $\lor$	Amount 🗸	Expected Claim Date $\uparrow$ $\checkmark$	Gaimed On $\lor$	Status Reason $\lor$
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	9	9	£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:** 

M001 - SCC Payment Claim	M001 - SCQF 5-GR62 22-Food and Drink Operations (Meat and Poultry Skills)-Food and Drink Operations-Revision-1 Avails Payment Claim - Training Provider Information Form - Status Status												
Submission	Training Provider Information Form												
	EF - Information	raining Provider Information Form											
Submit Pay	EF - Training Provider	-		Decline	Claim								
	ITA - Training Provider												
	ITA - Information												
	SERI Training Provider Information Form												
	SERI Information Form												
	GA Information												
	GA - Training Provider Information Form												
	Information												

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:

Submission       General       Evidence       Related         A Name       M001 - SCQF 5-GR62 22-Food and Drink Operations (Meat and Poultry Skills)-Food and Drink Operations-Revision-1         A Owner       • 1 Scotland Limited         A Individual Payment       • Andrea       Scotland Limited - MA - 2020 - GR62 22-Food and Drink Operations (Meat and Poultry Skills)-SCQF 5         A Claim Type       • Milestone         A Miestone Number       • 1         A Claim From       • 21/01/2021         A No of Units       •         Expected Claim Date       • 22/04/2021         A Claim Gon          © Amount       • £188.00         A Holding Reason          © SiA Approval Required       No         A Claiwsex       No	Payment Claim · Training	syment Claim · Training Provider Information Form >									
A Name       M001 - SCQF 5-GR62 22-Food and Drink Operations (Meat and Poultry Skills)-Food and Drink Operations-Revision-1         A Owner       * 1* Scotland Limited         A Individual Payment       * 1         A Claim Type       Milestone         A Miestone Number       1         A Claim From       * 21/01/2021         A No of Units       1         Expected Claim Date       * 22/04/2021         A Claim From       * 21/04/2021         A Claim Room       ***         G Laim Gon       ***         Q: Amount       * £188.00         A Hoiding Reason       ***         A SiA Approval Reason       ***         A Claims Koperations       No         A Claimsex       No	Submission General	E١	idence Related								
A Owner          •          •          •	🛆 Name		M001 - SCQF 5-GR62 22-Food and Drink Operations (Meat and Poultry Skills)-Food and Drink Operations-Revision-1								
A Individual Payment       * Image: Andrea Scotland Limited - MA - 2020 - GR62 22-Food and Drink Operations (Meat and Poultry Skills)-SCQF 5         A Claim Type       * Milestone         A Milestone Number       1         A Claim From       * 21/01/2021         A No of Units       1         Expected Claim Date       * 22/04/2021         B Claimed On          Q Amount       * £188.00         A Holding Reason          Q SIA Approval Required       No         A Claiwski       No	A Owner	*	な Scotland Limited								
A Claim Type       Milestone         A Milestone Number       1         A Claim From       21/01/2021         A No of Units       1         Expected Claim Date       22/04/2021         A Claimed On          Q Amount       £188.00         A Holding Reason          Q SIA Approval Required       No         A Claiwback       No	A Individual Payment Plan	•	andrea Scotland Limited - MA - 2020 - GR62 22-Food and Drink Operations (Meat and Poultry Skills)-SCQF 5								
△ Milestone Number       1         △ Claim From       * 21/01/2021         △ No of Units       1         Expected Claim Date       * 22/04/2021         △ Claimed On          △ Claimed On          ④ Claimed On          ④ Amount       * £188.00         △ Holding Reason          ◎ SiA Approval Required       No         △ Clawback       No	🛆 Claim Type	•	Milestone								
△ Claim From       * 21/01/2021         △ No of Units       1         Expected Claim Date       * 22/04/2021         △ Claimed On          △ Claimed On          △ Amount       * £188.00         △ Holding Reason          □ SIA Approval Required       No         △ Clawback       No	A Milestone Number	*	1								
A No of Units         1           Expected Claim Date         22/04/2021           △ Claimed On            ④ Amount         * £188.00           △ Holding Reason            ④ SIA Approval Required         No           △ Claiwback         No	A Claim From	•	21/01/2021								
Expected Claim Date * 22/04/2021            ظ Claimed On            Q. Amount * £188.00             Holding Reason            Q. SIA Approval Required No             Clawback No	A No of Units		1								
Claimed On        Q. Amount     * £188.00       A Holding Reason        Q. SIA Approval Required     No       A Clavback     No	Expected Claim Date	•	22/04/2021								
Qs_Amount         * £188.00           A Holding Reason            Qs_SIA Approval Required         No           A Clawback         No	🗄 Claimed On			Ē							
A Holding Reason        Q. SIA Approval Required     No       A Clawback     No	𝔍 Amount	*	£188.00								
Qs SIA Approval Required     No       A Clawback     No	A Holding Reason										
A Clawback No	SIA Approval Required		No								
	A Clawback		No								

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



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       Availab         Payment Claim - Training Provider Information Form ~       Stars R								
Submission General Evidence Related								
Submit Reyment 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:

Submission General Evidence Related

ission General Evi	der l	nforr :e	nati Rel	on Fo ated	orm	Ň						
/hen was evidence * pproved for this												
Submit Date	Jar	nuary	/ 202	2021		$\uparrow$	$\downarrow$	2021			$\land \downarrow$	
Submit Date	Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb	Mar	Apr	
	27	28	29	30	31	1	2					
	З	4	5	б	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 ~

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:

Confirmation Dialog ×								
On behalf of the Provider I represent, I submit this claim on the basis that I am authorised to do so and confirm that: - The Individual Training Plan (ITP) has been fully								
completed and signed by the Provider, Participant and employer - The ITP is up to date and accurate and the Provider is								
OK Cancel								

- 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:

	×	
Successfully processed Payment Claim		I
	ОК	
		J

- 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					
				🖒 Refresh 🗐 Run Re	eport $\lor$ 🖷 Excel Templates $\lor$ 🖏 Export Payment Claims $\mid$ $\lor$
✔ Claim Type ∨	Milestone Number $\vee$	Amount 🗸	Expected Claim Date $\uparrow$ $\checkmark$	Claimed On $\vee$	Status Reason $\checkmark$
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.