

## **FIPS Quick Start Guide**

**Teaching Bursary Claim Submission** 

This guide will cover how to create a Bulk Expense Authorisation and how to submit claims for the Teaching Bursary against this using the Expense Claim extension in FIPS. For the purpose of completing a claim for the Teaching Bursary in Scotland please continue to follow the guidelines below. FIPS will be updated in due course to reflect the name change. This will not affect any claims being submitted or paid via FIPS.

The link below will take you to the FIPS landing page on the SDS corporate website which contains additional FIPS guides and user information.



Guide last reviewed: 12/12/2024 Next review due: 12/11/2025

**Created by FIPS Support Team** 

Skills Development SDS FI iy the new look 💽 💡 🕂 📮 ۲  $\blacksquare$  Save As + New  $\vee$  imes Clear Default  $\circlearrowright$  Refresh All 🛃 Sha ⇔ Home Training Provider Dashboard  $\sim$ ( Recent 🖈 Pinned + New : Open Alerts for Me and My Training Provider  $\,\,\smallsetminus\,\,$ Announcements v + New : Assignments Active  $\lor$ Filter by keyword My Work Description \ Filter by keyword Q 影 Dashboards Descrip 1. New\*\*\*\*\*Festive Period Posting Runs & Syste Please note that FIPS √ Assignm ✓ Programm.... ∨ Subject ∨ ✓ Programme ✓ Status Rea Prefer Activities 2. Apprentice Eligibility Criteria SDS routinely matche New Employer Created A new MA Draft SMS FIPS New Employer Created A new 3. Employer Approvals (Claims Holding) When processing cla MA Draft SMS New Employer Created 4. Employer Search in FIPS - New Guidance 🗟 Individual Search The employer search A new MA Manual Approval ... Email 8 Individuals New Employer Created 5. ESF Evidence Alerts A new SDS delivery for ESF MA Awaiting Approval Email 🖸 Organisations 6. FIPS Support & Guidance Use website link belo New Employer Created A new MA Manual Approval ... SMS 7. MA Expected End Dates User Request ----New Employer Created A new When processing M4 MA Manual Approval ... SMS 🛱 User Requests A new Unconfirmed Assi... SMS New Employer Created MA New Start Email new Change of Circumstances su that re There MA Draft Extensions MA Confirmed Assign... Email New Employer Created A new Additional Suppo... New Start 🚰 Adopt An Appren... 🛱 Alerts  $\leftarrow \leftarrow Page 1 \rightarrow$ ABC 1 - 9 of 5000+ K ← ← Page 1 → ABC 1 - 9 of 532 Applications + New : + New : ASN Claims Active Applications ed Contracts Active Expense Claims  $\,\,\smallsetminus\,\,$ Filter by keyword 👂 Filter by keyword Filter by keyword Bulk Expense Aut... Total Contract Value  $\smallsetminus$ Amount  $\vee$ ✓ Expense Description ∨ ✓ Programme ∨ ✓ Date Active From ∨ Date Active To 🗸 Bulk YPA Clain Bulk Expense Authorisations Draft 10/05/2024 30/09/2026 £0.00 Tranche 2 £4,000.00 Change of Cir

## 1. On the Workplace menu, click into the Bulk Expense Authorisation entity:

2. The view will default to Active Bulk Expense Authorisations. This screen should be used to create a new Bulk Expense Authorisation. Click on New to open the form:

| =                  | ← 🖽 Focused view 🖾 Show Chart + M | New 🗐 Delete   🗸 💍 Refres | sh 🛛 🖾 Email a Link   🗸 | ≫ Flow ∨ 🗐 Ru         | n Report \vee 📲 Ex | cel Templates \vee 🗄 | 🖻 Share $$                         |
|--------------------|-----------------------------------|---------------------------|-------------------------|-----------------------|--------------------|----------------------|------------------------------------|
| User Request       | Active Bulk Expense Authorisatio  | ns ~                      |                         |                       | Edit columns       | Y Edit filters       | / keyword                          |
| 🛱 User Requests    | O Nature of Expense ~             | Amount (for contra ~      | Contract ~              | Expense Type ~        | Programme ~        | Status Reason ~      | Created On $\downarrow$ $\backsim$ |
| Extensions         | FA Travel 2024-2026               | £1,000.00                 | September 2024 Test     | FA Travel             | FA                 | Submitted            | 25/11/2024 14:2                    |
| Additional Suppor  | STEM Test Overvalue 2             | £1,000,000,000.00         | September 2024 Test     | STEM Bursary Payment  | STEM               | Draft                | 13/09/2024 10:4                    |
| 🛍 Adopt An Apprent | STEM Test Tranche 1               | £13,000.00                | September 2024 Test     | STEM Bursary Payment  | STEM               | Authorised           | 13/09/2024 10:2                    |
| Alerts             | Travel                            | £150.00                   | September 2024 Test     | Travel                | MA                 | Authorised           | 09/09/2024 15:4                    |
| ASN Claims         | Travel                            | £100.00                   | September 2024 Test     | Travel                | ма                 | Submitted            | 09/09/2024 12:1                    |
| Assignments        | FIPS CI - Authorised (FA)         | £50.00                    | March 2024 FA Traini    | FIPS CI - FA Bulk Exp | FA                 | Authorised           | 19/06/2024 16:0                    |
| 👪 Bulk Expense Aut | FIPS CI - Submitted (FA)          | £50.00                    | March 2024 FA Traini    | FIPS CI - FA Bulk Exp | FA                 | Submitted            | 19/06/2024 16:0                    |

3. When the form opens, the blank fields can be populated. All fields that show a red asterisk (\*) must be completed as these are mandatory fields:

| New Bulk Expense          | Authorisa | tion |  |
|---------------------------|-----------|------|--|
| General                   |           |      |  |
| Nature of Expense         | *         |      |  |
| Amount (for contract)     | *         |      |  |
| Programme                 | *         |      |  |
| Contract                  | *         |      |  |
| Programme Expense<br>Rule | *         |      |  |
| Expense Type              | *         |      |  |

4. Click into the Nature of Expense field and enter the relevant information for the claim. This is a free text field and must be manually typed into, clearly indicating which tranche payment you are claiming for. In the Amount (for contract) field enter the value of the claim. This cannot be more than the expense value agreed in the Grant Award letter:



5. Use the magnifying glass lookup to select STEM from the Programme field. Select the relevant contract from the list and the related Programme Expense Rule:

| Ne | ew Bulk Expense           | Au | thorisation - Unsaved            | Owner | Draft<br>Status Reason | $\sim$ |
|----|---------------------------|----|----------------------------------|-------|------------------------|--------|
| Ge | neral                     |    |                                  |       |                        |        |
|    | Nature of Expense         | *  | Tranche Payment One              |       |                        |        |
|    | Amount (for contract)     | *  | £750.00                          |       |                        |        |
|    | Programme                 | *  | G STEM                           |       |                        |        |
|    | Contract                  | *  | UNIVERSITY OF LIFE - STEM - 2021 |       |                        |        |
|    | Programme Expense<br>Rule | *  | STEM - STEM Bursary Payment      |       |                        |        |
| 1  | 🖰 Expense Type            | *  | STEM Bursary Payment             |       |                        |        |

6. When all the fields have been completed, the Expense Type field will automatically populate. In this example, the Expense Type shows as STEM Bursary Payment. Click on Save at the top of the ribbon bar:



6. The screen will refresh. Within the General tab, the evidence requirements will now be displayed:

| ← ⊏                      | 3                | 🔛 Save                   | 🛱 Sa                       | ve & Close  | + New          | 🗊 Delete         | 🖒 Refresh          | 🔍 Check Acces | s R <b>,</b> Assign | ଟ୍ଟୋ Email a Link | ≫ Flow ∨            | 🔁 Word Templa     | ites 🗸 | 🗐 Run Rej | port 🗸            |         |            |         |                        |     |
|--------------------------|------------------|--------------------------|----------------------------|-------------|----------------|------------------|--------------------|---------------|---------------------|-------------------|---------------------|-------------------|--------|-----------|-------------------|---------|------------|---------|------------------------|-----|
| \Lambda You n            | nust sa          | stisfy all evid          | ence requ                  | irements be | fore you may s | ubmit the Bulk E | xpense Authorisati | on.           |                     |                   |                     |                   |        |           |                   |         |            |         |                        |     |
| STEN<br>Bulk Ex<br>Submi | A Bu<br>opension | e Authoris<br>n / Author | Saved<br>ation<br>risation | / Rejec     | Genera         | Related          |                    |               |                     |                   |                     |                   |        |           |                   |         | Owne       | er      | Draft<br>Status Reason | n ~ |
| N                        | lature           | e of Expens              | e '                        | Tran        | che One        | Payment          |                    |               |                     |                   |                     |                   |        |           |                   |         |            |         |                        |     |
| A                        | mour             | nt (for<br>ct)           | 1                          | £750.00     |                |                  |                    |               |                     |                   |                     |                   |        |           |                   |         |            |         |                        |     |
| P                        | rogra            | imme                     | 1                          | 🖫 STEN      |                |                  |                    |               |                     |                   |                     |                   |        |           |                   |         |            |         |                        |     |
| C                        | Contra           | ict                      | 1                          |             | ERSITY OF      | LIFE - STEM - 3  | 2021               |               |                     |                   |                     |                   |        |           |                   |         |            |         |                        |     |
| P                        | Progra           | imme Expe                | nse *                      | 🛱 STEN      | I - STEM Bu    | rsary Paymen     | 1                  |               |                     |                   |                     |                   |        |           |                   |         |            |         |                        |     |
| ₿ E                      | xpens            | se Туре                  |                            | 🖨 STEN      | Bursary Pa     | yment            |                    |               |                     |                   |                     |                   |        |           |                   |         |            |         |                        |     |
|                          |                  |                          |                            |             |                |                  |                    |               |                     |                   |                     |                   |        |           |                   |         |            |         |                        |     |
| Evide                    | ence             | (Bulk Expe               | nse Aut                    | horisation) |                |                  |                    |               |                     |                   |                     |                   | Ö F    | efresh 🕬  | Flow $\checkmark$ | 🗐 Run F | Report 🗸 🧃 | Excel 1 | īemplates ∨ _ :        |     |
| C                        | )                | Name $\vee$              |                            |             |                | Evidence         | Request Text 🚿     | /             | Type $\lor$         | Lin               | ked To $\checkmark$ |                   | Payme  | nt Cl 🗸   | Payment I         | PI ∨    | Expense Cl | $\sim$  | Status Reas $\vee$     | ,   |
|                          |                  | STEM Bur                 | sary Evi                   | dence       |                | Please up        | load required S    | TEM Bursary p | Document U          | pload B           | ulk Expense Auti    | horisations (all) |        |           |                   |         |            |         | Requested              |     |
|                          |                  |                          |                            |             |                |                  |                    |               |                     |                   |                     |                   |        |           |                   |         |            |         |                        |     |

- Click on the hyperlink to open the evidence request:

| Evidenc    | Evidence (Bulk Expense Authorisation) |  |  |  |  |  |  |
|------------|---------------------------------------|--|--|--|--|--|--|
| $\bigcirc$ | Name $\checkmark$                     |  |  |  |  |  |  |
|            | STEM Bursary Evidence                 |  |  |  |  |  |  |
|            |                                       |  |  |  |  |  |  |

7. The evidence upload screen will open. Use the paperclip to open the upload wizard:

| 는 🖬 Save 🛱 Save & Close 🗋 Deactivate 📋 Delete 🖒 Refresh 🔍 Check Acce         | ess 🔍 Assign 🖾 Email a Link 🔊 Flow 🗸 🧧 Word Templates 🗸 |         |
|--|---|---------|
| STEM Bursary Evidence - Saved<br>Evidence - Submission (Training Provider) ~ |   |         |
| Information Document Uploads Calling Record Related                          |   |         |
| Timeline   |   | + 7 I : |
| ✓ Search timeline  |   |         |
| Enter a note   |   | Û       |
| Filter by $	imes$  |   |         |
| No filters available   | $(\pm)$   |         |
|  | $\bigcirc$  |         |
|  | Get started   |         |
|  | Capture and manage all records in your timeline.        |         |
|  |   |         |

8. Locate the approved STEM Bursary evidence – schedules one and two from the Grant Award letter - from your computer and select it to attach to FIPS:



9. Once added to FIPS, the document will appear within the upload wizard. Title the evidence upload then click on 'Add note':

| STEM Bursary Evidence - Saved<br>Evidence - Submission (Training Provider) >> |                 |
|---|-----------------|
| Information Document Uploads Calling Record Related                           |                 |
| Timeline  | + 7 1 :         |
| ∫O Search timeline  |                 |
| Cruste a note   |                 |
| STEM Evidence   |                 |
| Enter text  |                 |
|   |                 |
|   |                 |
|   |                 |
|   |                 |
| \$ Fort • Size • B I U ∠.• A.• = = += += = = = = = = = = = = = = = =          |                 |
| 📲 STEM Bursary Evidence.doc. 🗙  |                 |
| 0   | Add note Cancel |
| Eiher hu  |                 |
| rine uy   |                 |

- If Add note is not clicked each time a document is selected, it will not be added to FIPS. Multiple documents can be uploaded, and the steps above should be followed for each document. You cannot upload multiple documents in a single action.
- Once Add note has been clicked, the document will be displayed under the Document Uploads tab:

| Read-only This record's status: Inactive                                     |          |                                     |
|--|----------|-------------------------------------|
| STEM Bursary Evidence - Saved<br>Evidence - Submission (Training Provider) ~ |          |                                     |
| Information Document Uploads Calling Record Related                          |          |                                     |
| Timeline   |          |                                     |
|  |          |                                     |
| Enter a note   |          |                                     |
| Filter by  | $\times$ | ₩ Note modified by<br>STEM Evidence |
| Record type 🗸  |          | 🛱 STEM Bursary Evidence.docx        |
|  |          |                                     |
|  |          |                                     |

- If the incorrect document(s) has been uploaded, hover over the upload and the delete function will be displayed:

|   | + 7 ie :  |
|---|---|
|   |   |
|   | 0   |
| X | Delete note   |
|   | X Co STEM Evidence<br>STEM Evidence<br>C STM Sursay Evidence.doc. |

10. Once the evidence upload is complete, click twice on the back arrow to return to the Bulk Expense Authorisation:

| < C D                   | Activate                                 | 🗓 Delete       | 🖔 Refresh   | 🔍 Check Access | 워, Assign | 🖙 Email a Link |  |
|-------------------------|--|----------------|-------------|----------------|-----------|----------------|--|
| Go back<br>STEM Burs    | Go back<br>STEM Bursary Evidence - Saved |                |             |                |           |                |  |
| Evidence · Su           | DMISSION (I                              | raining Provid | aer) 🗸      |                |           |                |  |
| Information             | Docum                                    | ent Uploads    | Calling Re  | cord Related   |           |                |  |
| Information<br>Timeline | Docum                                    | ent Uploads    | Calling Ree | cord Related   |           |                |  |
| Information<br>Timeline | Docume                                   | ent Uploads    | Calling Re  | cord Related   |           |                |  |

11. When the form opens, click into the Submission / Authorisation / Rejection tab to submit the Bulk Expense Authorisation to SDS for approval:





**12.** Click on Submit. Click on Proceed to continue with the submission. Clicking on Cancel will leave the Bulk Expense Authorisation in Draft status:



13. Once the Bulk Expense Authorisation has been submitted, the status reason will show as Submitted and the fields will be locked. No further changes can be made, and the Bulk Expense Authorisation will then be approved or rejected by SDS:

| EM Bursary - Save<br>Expense Authorisation | d<br>1<br>ion / Reje | c General       | Related         |                |   |             |     |           |              |   | Owne             | sr Status Rea       |
|--|----------------------|-----------------|-----------------|----------------|---|-------------|-----|-----------|--------------|---|------------------|---------------------|
| 3 Nature of Expense                        | Tra                  | nche One        | Payment         |                |   |             |     |           |              |   |                  |                     |
| Amount (for contract)                      | •<br>£750            | 00              |                 |                |   |             |     |           |              |   |                  |                     |
| 3 Programme                                | * 🗔 s                | TEM             |                 |                |   |             |     |           |              |   |                  |                     |
| 🗄 Contract                                 | • 🖻 U                | NIVERSITY OF L  | IFE - STEM - 20 | 21             |   |             |     |           |              |   |                  |                     |
| Programme Expense<br>Rule                  | •<br>@ s             | TEM - STEM Bur  | sary Payment    |                |   |             |     |           |              |   |                  |                     |
| 3 Expense Type                             | • 🖾 s                | TEM Bursary Pay | ment            |                |   |             |     |           |              |   |                  |                     |
| vidence (Bulk Expense /                    | Authorisati          | on)             |                 |                |   |             |     |           | U            | ) Refresh $\ _{\rm e}^{\rm re}$ Flow $\ \!$ | 圓 Run Report 〜 切 | 🖁 Excel Templates 💛 |
| Name V                                     |                      |                 | Eviden          | e Request Text | × | Type $\sim$ | Lin | iked To 🗸 | Payment Clai | i V Payment Plan V  | Expense Claim 🗸  | Status Reason 🗸     |

- Any changes made to the record by SDS will generate an alert on the FIPS Provider Dashboard.
- Once the Bulk Expense Authorisation has been approved, STEM / Teaching bursary expense claims can be processed against this.



14. To process a STEM bursary claim, click into the Expense Claims entity on the Workplace menu. When the screen loads, click on New:

|          | Skills<br>Development<br>Scotland | SDS FIPS |  |
|----------|-----------------------------------|----------|--|
| ≡        |                                   |          | Export to Excel Templates  Constraint of the templates  Constraint of templates  Constra |
|          | Applications                      | ^        | Active Expense Claims 🗸  |
| E,       | ASN Claims                        |          | ✓ Expense Description ∨ Amount ∨ Individual (Assignme ∨ Expense Type ∨ Status Reason ∨ Decision Rationale ∨  |
|          | Assignments                       |          | Lodgings & Travel for September 2021 £4,686.35 Travel & Lodgings Approved  |
|          | Bulk YPA Claim                    | u        | Travel and Lodgings £1,790.00 Travel & Lodgings Approved   |
| $\odot$  | Change of Circu                   | J        |  |
| $\odot$  | Change of Circu                   | J        |  |
|          | Contract Chang                    | je       |  |
| ₽,       | Contract Milesto                  | o        |  |
|          | Contracts                         |          |  |
| IΞ       | Electris Validatio                | ons      |  |
| ~        | Expense Author                    | ri       |  |
| 胛        | Expense Claims                    | 8        |  |
| <b>F</b> | Forecasts                         |          |  |
|          | Incentive Claims                  | s        |  |

## **15.** The Expense claim submission form will open:

| ← c            | 🗹 🔛 Save 🔐                                      | Save & Close + New 😰 Flow 🗸 |  |  |  |  |  |
|----------------|---|-----------------------------|--|--|--|--|--|
| New<br>Expense | New Expense Claim<br>Expense Claim - Expenses ~ |                             |  |  |  |  |  |
| Gene           | General   |                             |  |  |  |  |  |
| E              | Expense Description                             | t un                        |  |  |  |  |  |
| ,              | Amount  | *                           |  |  |  |  |  |
| F              | From Financial Period                           | *                           |  |  |  |  |  |
| 1              | To Financial Period                             | *                           |  |  |  |  |  |
| F              | Programme                                       | *                           |  |  |  |  |  |
| 0              | Contract  | *                           |  |  |  |  |  |
| E              | Bulk Expense Claim                              | Yes                         |  |  |  |  |  |
| E              | Bulk Expense<br>Authorisation                   | •                           |  |  |  |  |  |
| A              | Expense Type                                    | *                           |  |  |  |  |  |
| (              | Owner   | - А STEM TP                 |  |  |  |  |  |
| <b>A</b> )     | Young Persons<br>Allowance Claim                | No                          |  |  |  |  |  |
|                |   |                             |  |  |  |  |  |
| Evid           | dence   |                             |  |  |  |  |  |
| Out            | tcome   |                             |  |  |  |  |  |
| (              | Decision Rationale                              |                             |  |  |  |  |  |



16. All fields that contain an asterisk are mandatory and must be completed before the claim can be submitted. Input the description of the claim clearly indicating which tranche payment you are claiming for. Select the financial period for the claim; the from and to fields must be the same. The Bulk Expense Claim field must be set to Yes – the relevant Bulk Expense Authorisation can now be selected from the lookup:

| $\leftarrow$ | 다 🔓 Sav   | e 🛱    | Sav | re & Close → New 🔊 Flow ∨                  |  |  |  |  |  |  |
|--------------|---|--------|-----|--|--|--|--|--|--|--|
| Ne<br>Exp    | New Expense Claim - Unsaved<br>Expense Claim · Expenses ~ |        |     |  |  |  |  |  |  |  |
| Ge           | General   |        |     |  |  |  |  |  |  |  |
|              | Expense Descr   | iption | *   | Tranche One Payment                        |  |  |  |  |  |  |
|              | Amount  |        | *   | £750.00                                    |  |  |  |  |  |  |
|              | From Financial  | Period | *   | ☑ Sep-24                                   |  |  |  |  |  |  |
|              | To Financial Pe   | eriod  | *   | B Sep-24                                   |  |  |  |  |  |  |
|              | Programme   |        | *   | G STEM                                     |  |  |  |  |  |  |
|              | Contract  |        | *   | September 2024 Test Training - STEM - 2024 |  |  |  |  |  |  |
|              | Bulk Expense (  | Claim  |     | Yes  |  |  |  |  |  |  |
|              | Bulk Expense<br>Authorisation                             |        | *   | STEM Bursary - Tranche One Payment X       |  |  |  |  |  |  |
|              |   |        |     | Bulk Expense Authorisation                 |  |  |  |  |  |  |

- > This must be the BEA that was created prior to submitting the claim. The value of the BEA and the value of the Expense claim must be the same.
- When the Bulk Expense Authorisation has been selected, the Expense Type field will auto populate. Once all the fields have been populated, click on Save on the top ribbon bar.

| ≡               |                   | ← 🖆 🖬 Save & Close + New 🔊 Flow ∨                         |  |
|-----------------|-------------------|---|--|
| User Request    |                   | New Expense Claim - Unsaved<br>Expense Claim · Expenses ~ |  |
| 🔀 User Requests |                   | General   |  |
| Extensions      |                   |   |  |
| Ē               | Additional Suppor | Expense Description * Tranche One Payment                 |  |
| B               | Adopt An Apprent  |   |  |
| 公               | Alerts            | Amount * <b>£750.00</b>                                   |  |
|                 | Applications      | From Financial Period * 🔀 Sep-24                          |  |
| E,              | ASN Claims        |   |  |
|                 | Assignments       | To Financial Period * 🐼 Sep-24                            |  |
| 4               | Bulk Expense Aut  | Programme * 🕞 STEM  |  |
|                 | Bulk YPA Claim    |   |  |
| $\oslash$       | Change of Circum  | Contract * 🗎 September 2024 Test Training - STEM - 2024   |  |



## 17. Once saved, the Submit button will now be displayed within the Submission / Approve / Rejection tab:

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The value of the claim will then be added to the pre-posting run for payment. The claim will be transferred by SDS finance the week following the claim submission. That completes the Bulk Expense Authorisation and claim submission for STEM/Teaching Bursary.