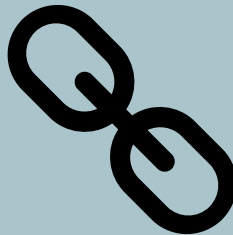


# FIPS Quick Start Guide

## 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.

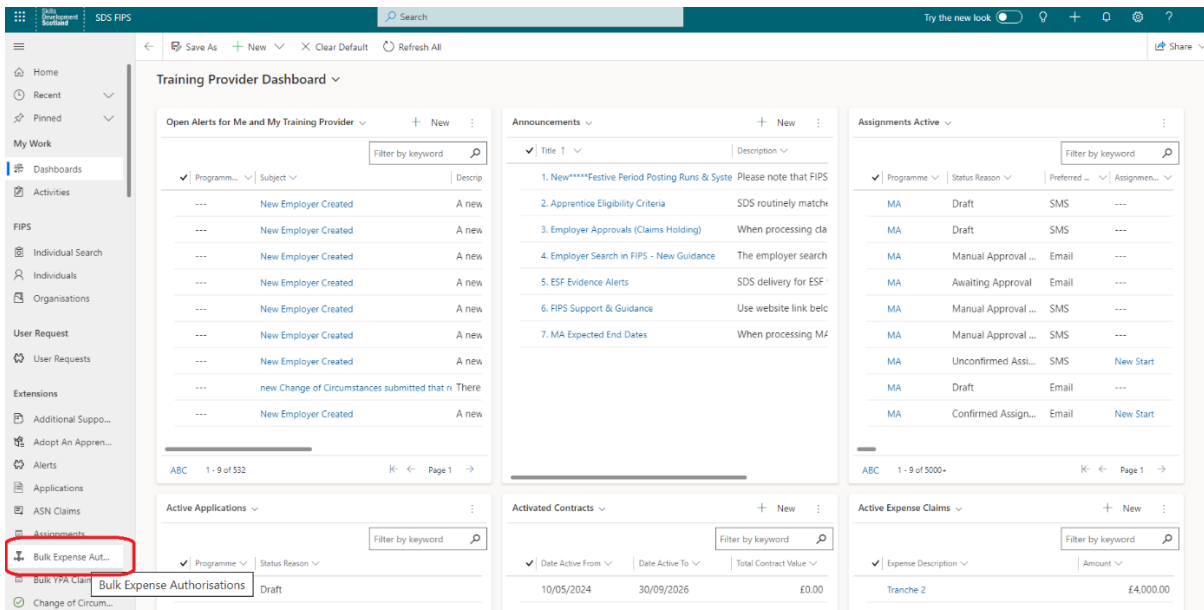


Guide last reviewed: 12/12/2024

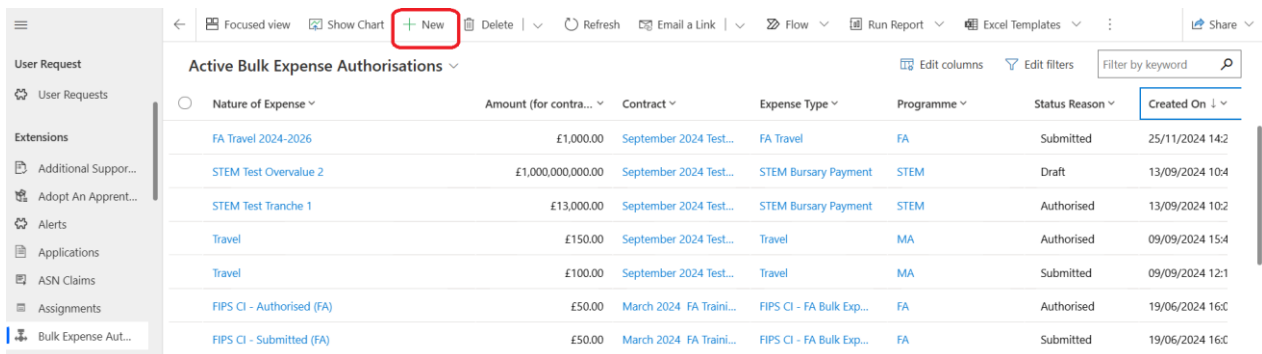
Next review due: 12/11/2025

Created by FIPS Support Team

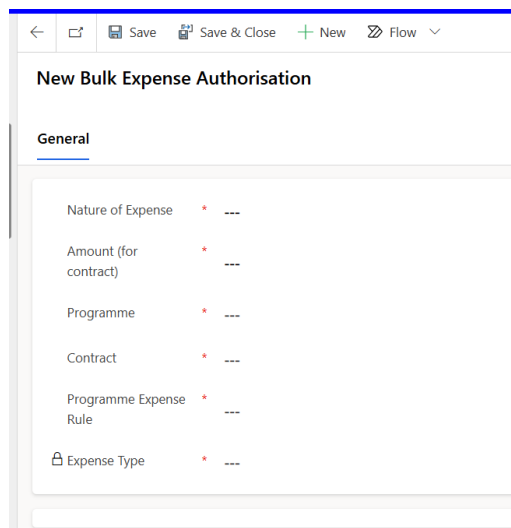
**1. On the Workplace menu, click into the Bulk Expense Authorisation entity:**



**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:**



**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:**



- 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:

**New Bulk Expense Authorisation** - Unsaved

**General**

Nature of Expense	* Tranche One Payment
Amount (for contract)	* £750.00

- 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:

**New Bulk Expense Authorisation** - Unsaved Owner Draft Status Reason ▼

**General**

Nature of Expense	* Tranche Payment One
Amount (for contract)	* £750.00
Programme	*  STEM
Contract	*  UNIVERSITY OF LIFE - STEM - 2021
Programme Expense Rule	*  STEM - STEM Bursary Payment
Expense Type	*  STEM Bursary Payment

- 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:

← ↶ Save Save & Close + New Flow ▼

**New Bulk Expense Authorisation** - Unsaved

**General**

Nature of Expense	* Tranche One Payment
Amount (for contract)	* £750.00
Programme	*  STEM
Contract	*  UNIVERSITY OF LIFE - STEM - 2021
Programme Expense Rule	*  STEM - STEM Bursary Payment
Expense Type	*  STEM Bursary Payment

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

STEM Bursary - Saved  
Bulk Expense Authorisation

Submission / Authorisation / Rejec... **General** Related

Nature of Expense \* Tranche One Payment

Amount (for contract) \* £750.00

Programme \* STEM

Contract \* UNIVERSITY OF LIFE - STEM - 2021

Programme Expense Rule \* STEM - STEM Bursary Payment

Expense Type \* STEM Bursary Payment

Evidence (Bulk Expense Authorisation)

Name	Evidence Request Text	Type	Linked To	Payment CL...	Payment PL...	Expense CL...	Status Reas...
<a href="#">STEM Bursary Evidence</a>	Please upload required STEM Bursary p...	Document Upload	Bulk Expense Authorisations (all)				Requested

- Click on the hyperlink to open the evidence request:

Evidence (Bulk Expense Authorisation)

Name

[STEM Bursary Evidence](#)

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

STEM Bursary Evidence - Saved  
Evidence - Submission (Training Provider)


Information **Document Uploads** Calling Record Related

Timeline

Search timeline

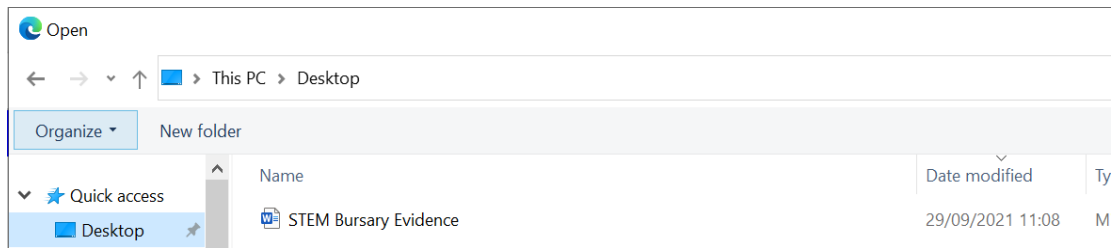
Enter a note...

Filter by  
No filters available

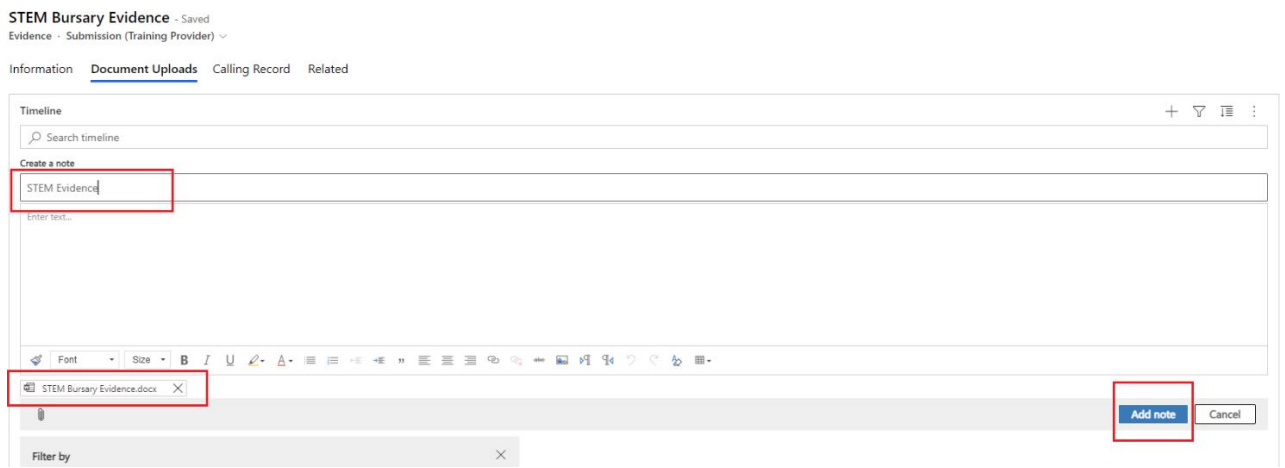


**Get started**  
Capture and manage all records in your timeline.

**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:**

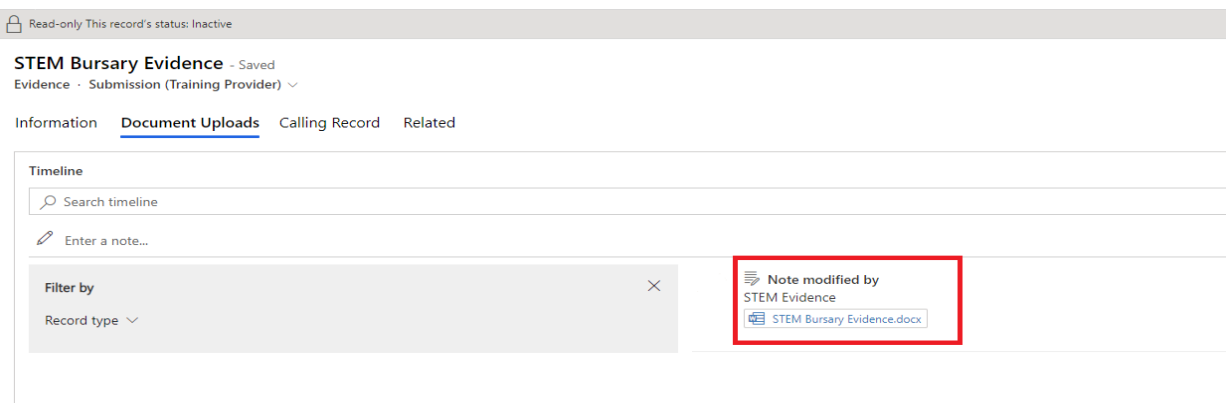


**9. Once added to FIPS, the document will appear within the upload wizard. Title the evidence upload then click on 'Add note':**

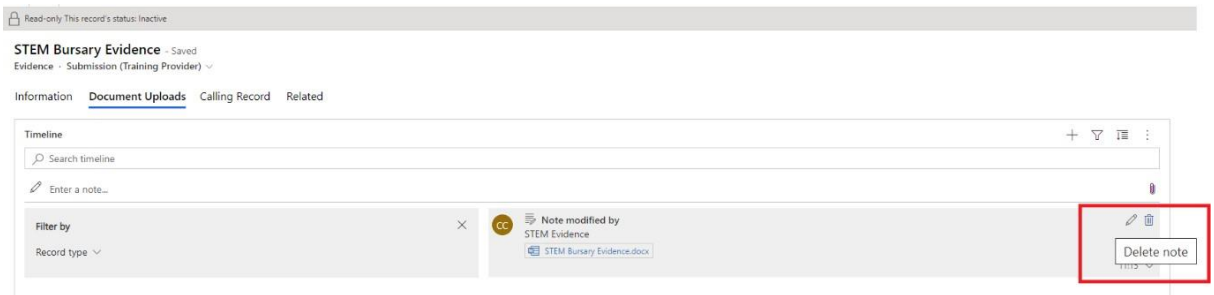


➤ If Add note is not clicked each time a document is selected, it will not be added to FIPS. Multiple documents can be uploaded, and the steps above should be followed for each document. You cannot upload multiple documents in a single action.

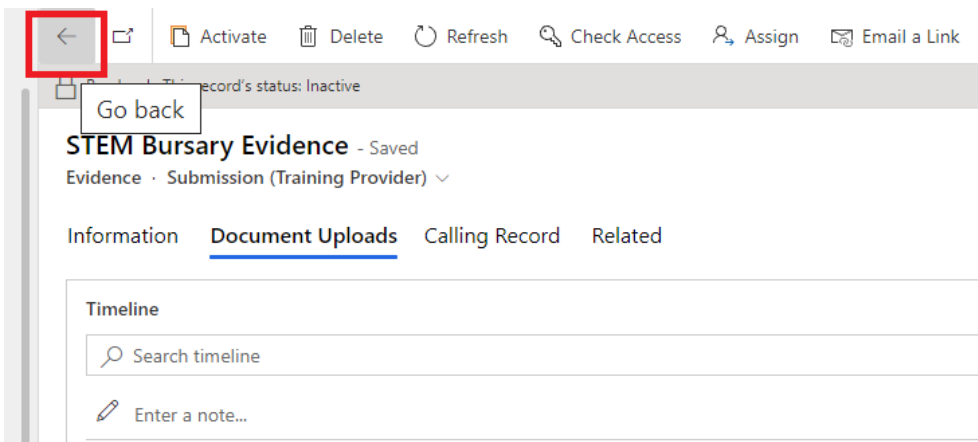
- **Once Add note has been clicked, the document will be displayed under the Document Uploads tab:**



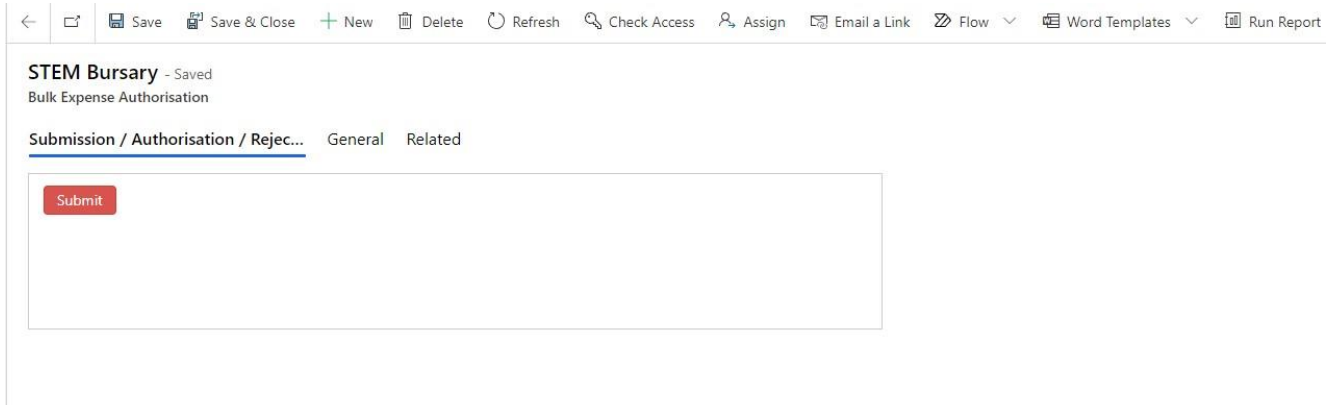
- If the incorrect document(s) has been uploaded, hover over the upload and the delete function will be displayed:



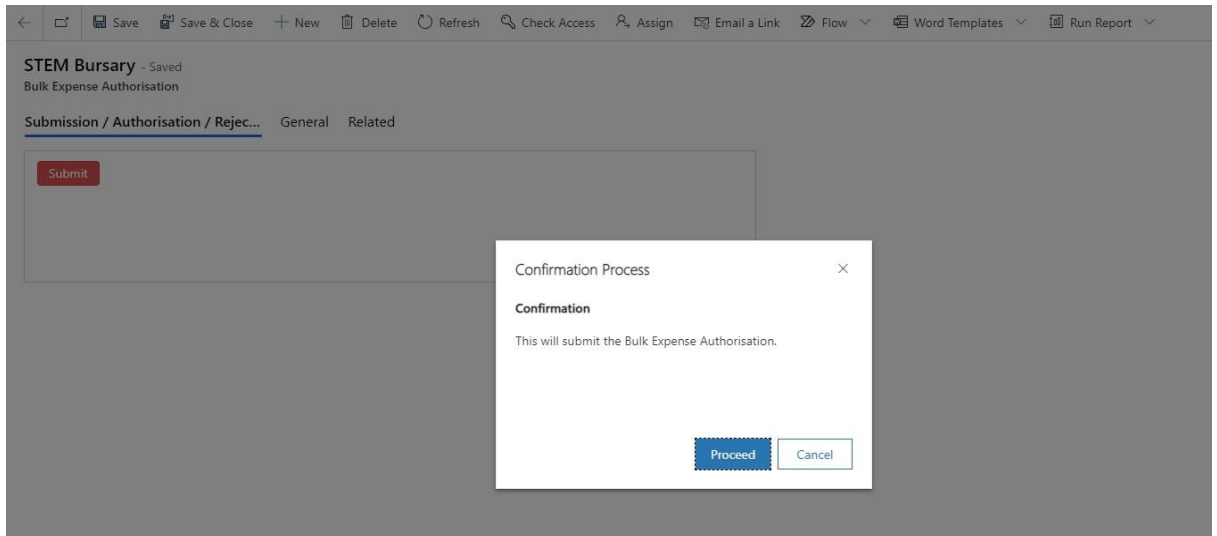
**10. Once the evidence upload is complete, click twice on the back arrow to return to the Bulk Expense Authorisation:**



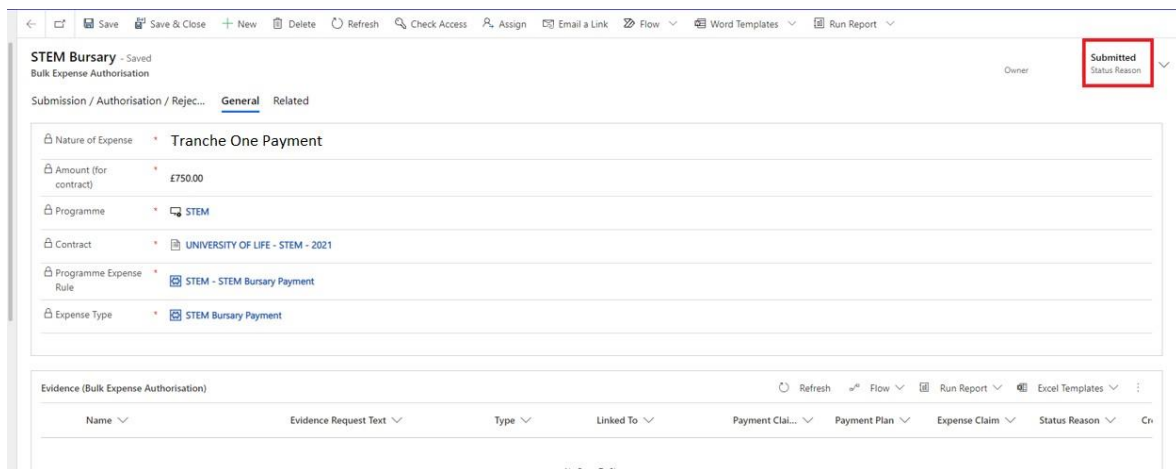
**11. When the form opens, click into the Submission / Authorisation / Rejection tab to submit the Bulk Expense Authorisation to SDS for approval:**



**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:**



- 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:

Expense Description	Amount	Individual (Assignme...	Expense Type	Status Reason	Decision Rationale
Lodgings & Travel for September 2021	£4,686.35	---	Travel & Lodgings	Approved	---
Travel and Lodgings	£1,790.00	---	Travel & Lodgings	Approved	---

15. The Expense claim submission form will open:

**New Expense Claim**  
Expense Claim · Expenses

**General**

Expense Description \* ---

Amount \* ---

From Financial Period \* ---

To Financial Period \* ---

Programme \* ---

Contract \* ---

Bulk Expense Claim **Yes**

Bulk Expense Authorisation \* ---

Expense Type \* ---

Owner \* STEM TP

Young Persons Allowance Claim **No**

**Evidence**

**Outcome**

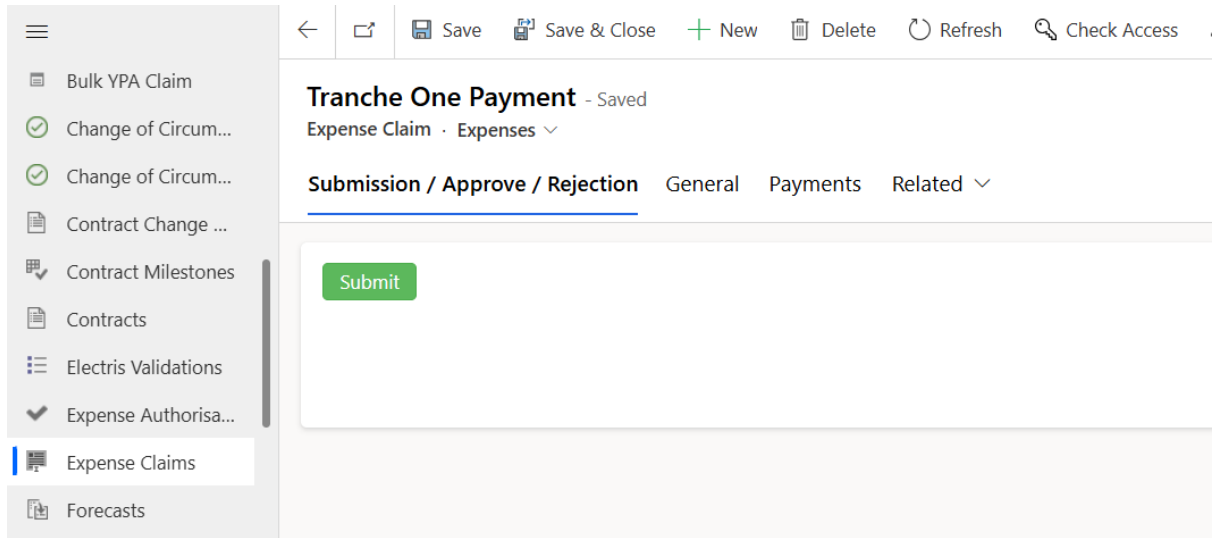
Decision Rationale ---



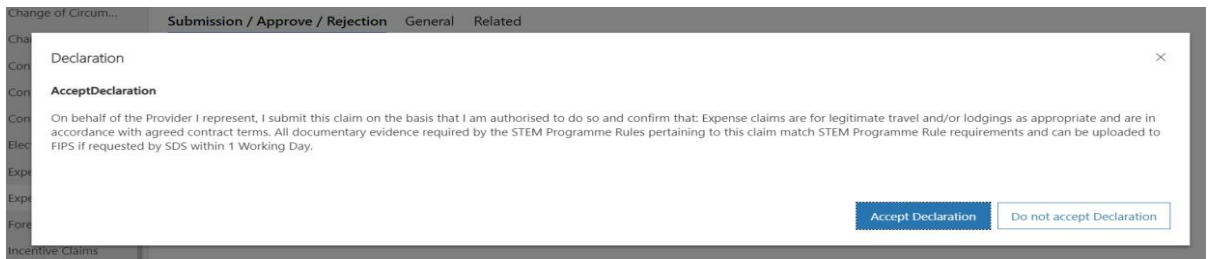
**16. All fields that contain an asterisk are mandatory and must be completed before the claim can be submitted. Input the description of the claim clearly indicating which tranche payment you are claiming for. Select the financial period for the claim; the from and to fields must be the same. The Bulk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

- **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.**

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



**- Click on Submit then Accept Declaration to process the claim for payment:**



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.