# FIPS QUICK START GUIDE

## Managing MA Draft and Rejected Assignments

> **This guide will cover how to input an assignment into FIPS for an MA participant and how to resubmit or delete a rejected assignment. The guidance document for Entering an Application should be followed prior to this document.**

1. **An application is entered into FIPS by the Training Provider and submitted to an assignment. Assignment then exists in draft format. The record will be listed within the Assignments entity on the Workplace menu. Within the assignment the Status Reason will show as Draft, prior to submitting for approval:**
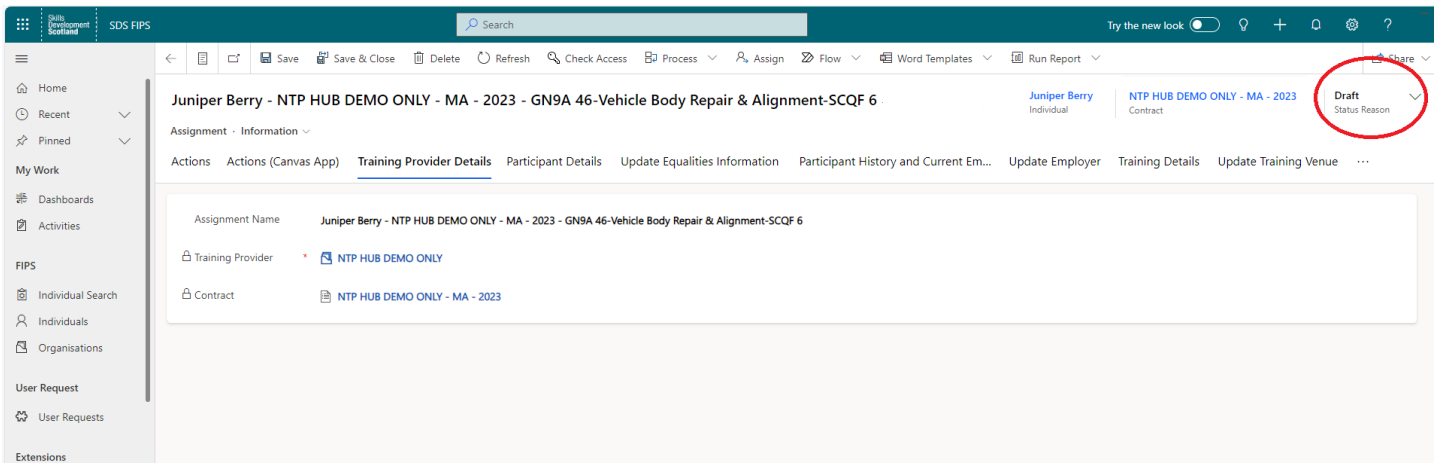

> Assignment in draft status. Status Reason shows as "Draft". It has not yet been submitted for approval. Record is listed within the Assignments entity.

2. **All the details input in the application will appear in the draft assignment. The information entered for the individual should be reviewed when the assignment is in draft status. If any amendments are required to the information entered, this should be completed now, prior to the record being sent for approval. <u>Attention should be paid to the Expected End Date of the assignment – review this and update it if required as FIPS may have changed this as part of the application submission.</u>**

- **Depending on the magnification / zoom settings on the FIPS user's web browser, all the tabs may not be displayed across the top of the screen. This means additional tabs may be hidden in the ellipses tab. Click the ellipsis to view any hidden tabs:**
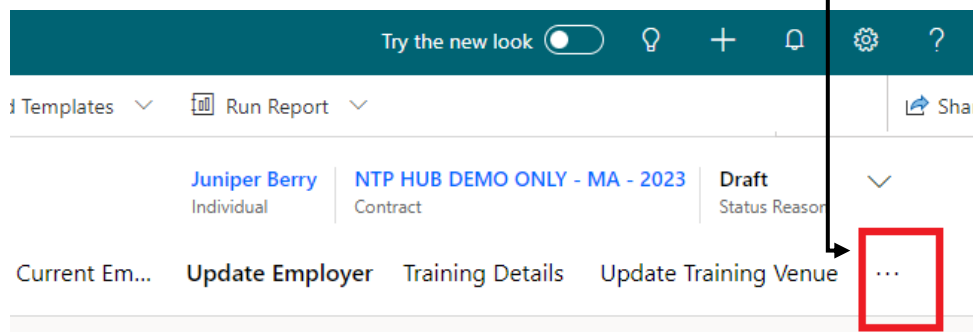
Participant personal details cannot be edited in the draft assignment (the fields will show as locked) but can be edited in the Individual Contact screen at this stage or after the record has been sent for approval. To view the Individual Contact screen, click on the Individual name hyperlink(s). There is another name hyperlink within the Participant Details tab that can be used to access the Individual Contact. Any changes made in the Individual Contact will update the fields in the assignment record.

3. **The Individual Payment Plan (IPP) is generated by FIPS when the draft assignment is created. The payment claims will show as Pending until the assignment has been approved. The Attachments tab in the draft assignment should be used to upload any relevant documents that relate to that participant e.g., Enhanced Funding, if relevant. The Attachments tab may be shown within the ellipsis tab. The tabs will re-order themselves depending on which tab is being viewed:**
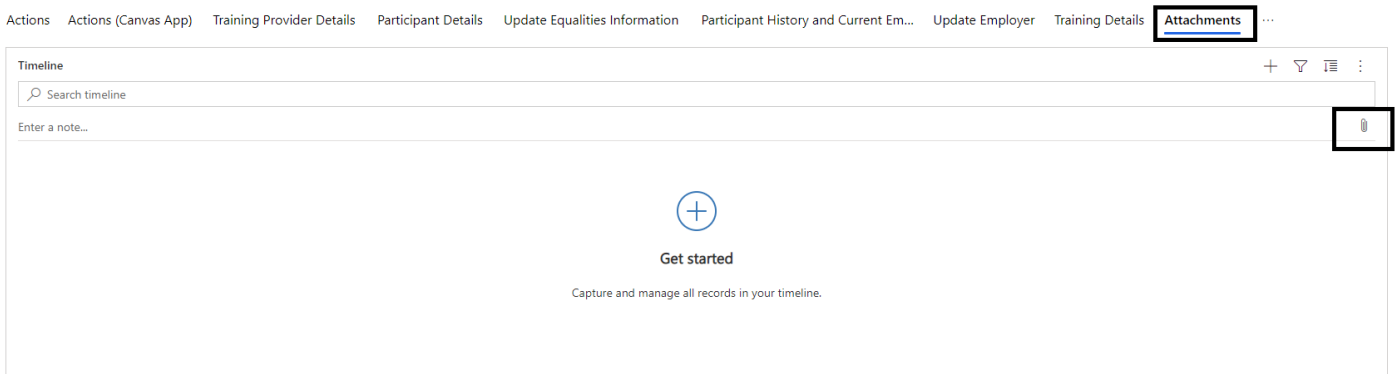
4. **Once all the information has been checked for accuracy, the draft assignment can be sent for approval.** *If at this stage you do not intend to fully create an assignment for the participant, the "Delete by Training Provider" button within the Actions tab will set this to deleted – this process is noted below.* **Within the Actions (Canvas App) tab, the Submit for Approval button will be displayed:**
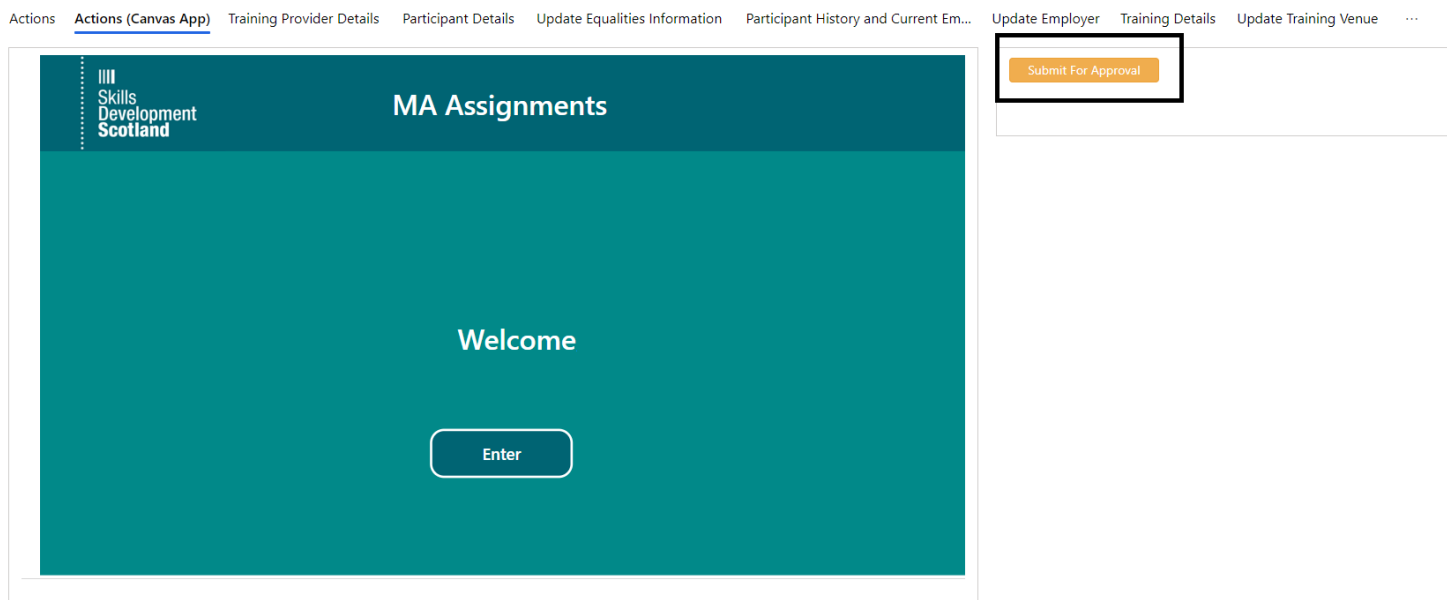
5.   When Submit for Approval is selected, follow the submission boxes which will set the record to either Manual Approval Required (by SDS) or the assignment will be automatically approved by FIPS and the assignment will show as Unconfirmed status.

6. **Once submitted, the page will refresh, and the Assignment Status will be updated. When a record goes to Manual Approval Required, it is checked by the SDS Contract Team and approved or rejected. Once it has been manually approved, the assignment will be updated to show as "Unconfirmed" status – the validation process will then begin. For an assignment that is automatically approved by FIPS, the status will immediately show as Unconfirmed and the assignment / new start validation process begins.**

> The validation process is covered in a separate guide. Refer to this for further details on the assignment validation process for MA participants.

Reactivating Rejected Assignments

1. **If an assignment is rejected by SDS, an alert will be received on the FIPS Dashboard advising of this. From the date of rejection, there are 15 calendar days to reactivate the record. Reactivating a rejected assignment will send it for approval to SDS again. Changes to the record can be made while the assignment is in draft status prior to resubmission. The Reactivate for Resubmission button is displayed under the Actions (Canvas App) Tab of a rejected assignment:**

> Status Reason shows as "Rejected". Actions (Canvas App) tab displays the Reactivate for Resubmission button. When an assignment has been rejected, it will show as "Read Only / Inactive" and no changes can be made until "Reactivate for Resubmission" is selected. This will set the record back to Draft Assignment status and it can be submitted for approval again. The assignment / new start validation process will then begin again once the assignment is at Unconfirmed status.

2. **To view the reason for rejection, click into the Approval and Rejection tab in the assignment. This will display the submission details and the reason for rejection:**

Rejection Reason and Rejected On fields highlighted above. The reason for rejection is manually input by the SDS Contract Team when the record is rejected. Training Providers can contact their Contract Executive directly to discuss this further.

3. **To submit the assignment for review / approval again, click on Reactivate for Submission within the Canvas App tab. The following message will be displayed. Click on OK to complete the action:**
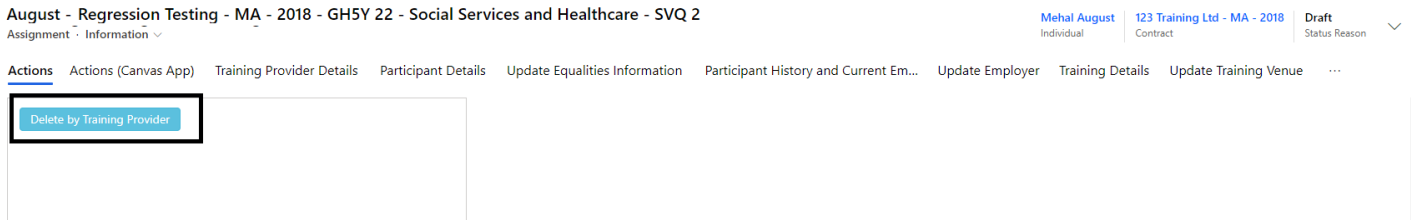
Deleting a Draft Assignment

1. Once an assignment has been reactivated from rejected status, it will show as Draft Assignment status and can be edited and sent for approval again or deleted by the Training Provider. To delete the draft assignment in full if you do not intend to submit it, either after it has been rejected or prior to submitting for approval, the "Delete by Training Provider" button should be used. This is displayed in the Actions tab:

- Deleting will remove the draft assignment and application in full.

2. When the Delete by Training Provider button is selected, the following confirmation box will be displayed. By clicking "Accept", the assignment will be permanently deleted and cannot be resubmitted / edited by the Training Provider or SDS after this:
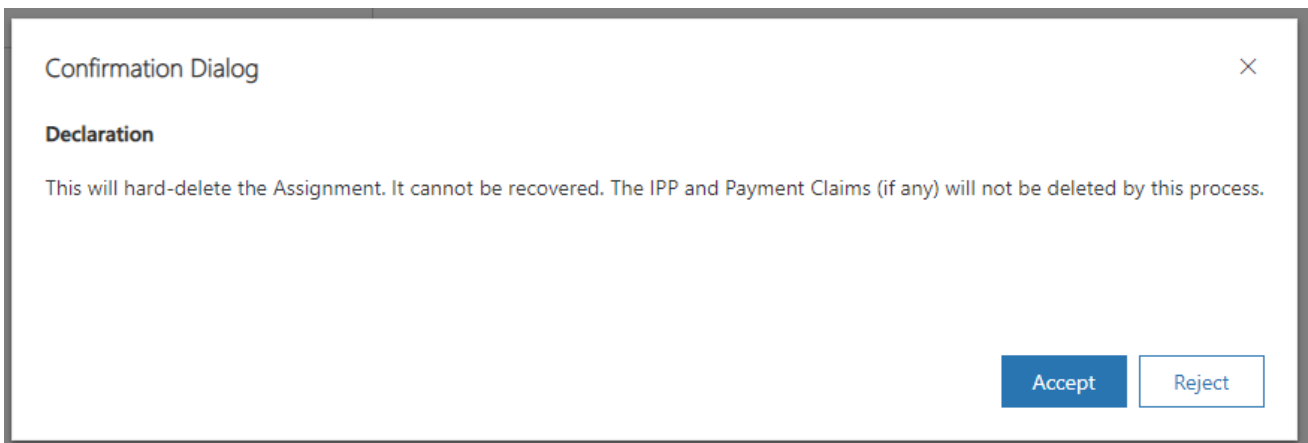
- Clicking on "Reject" will leave the record in its current state and the screen will refresh. Rejected records will be displayed within the Assignments entity under the Assignments Rejected system view.

That completes the assignment submission / rejected assignment resubmission process. FIPS users should refer to the other Quick Start Guides for processing claims and managing participant details for more information.

Guide last reviewed: 15/01/2024
Next review due: 15/01/2025