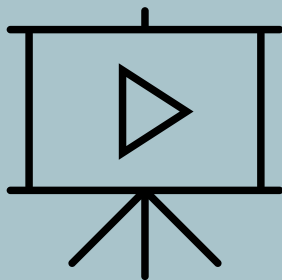


FIPS Quick Start Guide

How to Update Participant Contact and Personal Details

This guide will cover how to update participant contact information held in FIPS. The Individuals entity must be used to update and manage participant personal data. Any changes made within an Individual Contact record will update the related participant assignment. Participant name, email address, home phone and mobile number, home address, SQA candidate number (SCN) and preferred method of contact must be amended within the Individual Contact screen. These details cannot be edited directly within an assignment as the fields are locked.

- The links below provide a tutorial demonstration of how to navigate the individual record to amend personal and contact information. Click on play to view this or right click and select Open in Browser to access it directly. Use the link icon to access the FIPS landing page on the SDS corporate website which contains additional FIPS guides and user information.

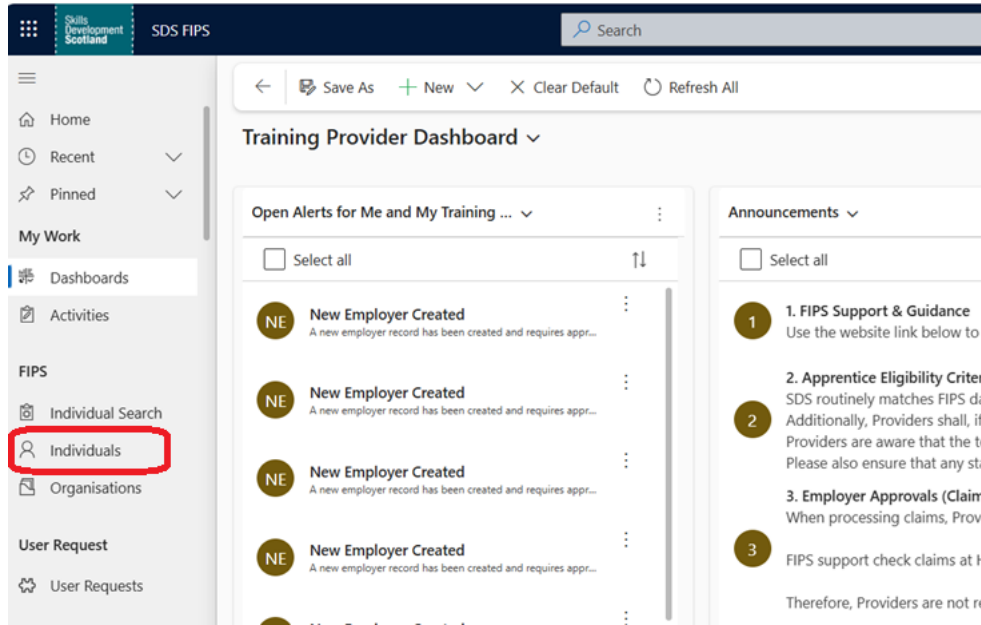


Guide last reviewed: 30/10/2025

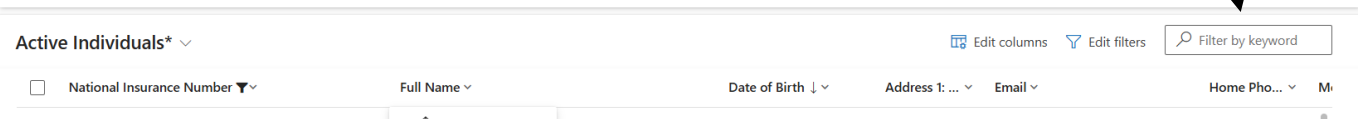
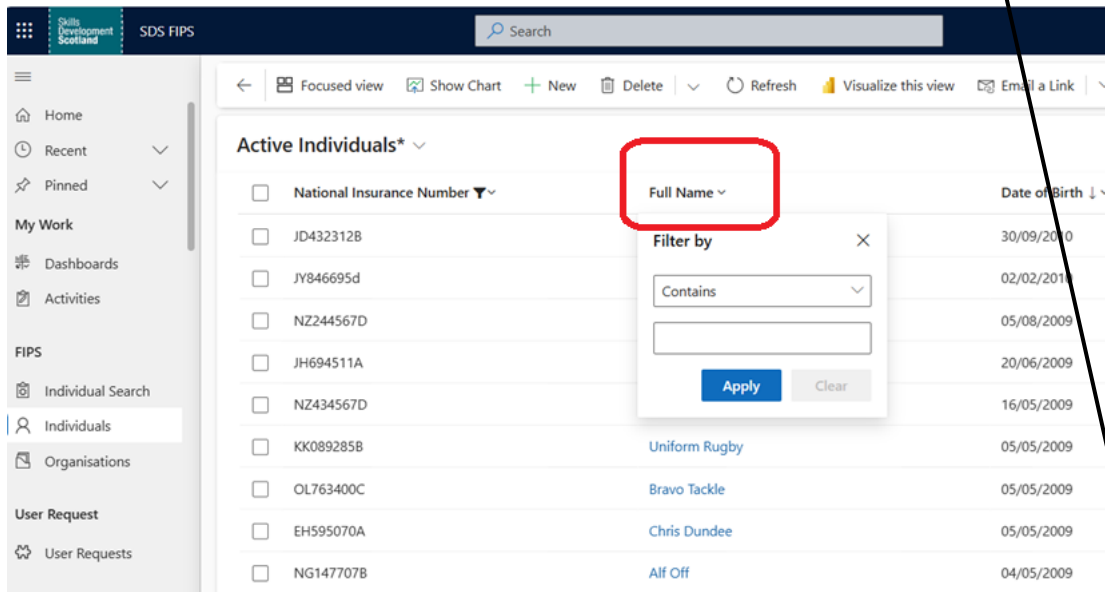
Next review due: 30/01/2027

Created by FIPS Support Team

1. An individual record can be accessed by clicking into the Individuals entity on the workplace menu:

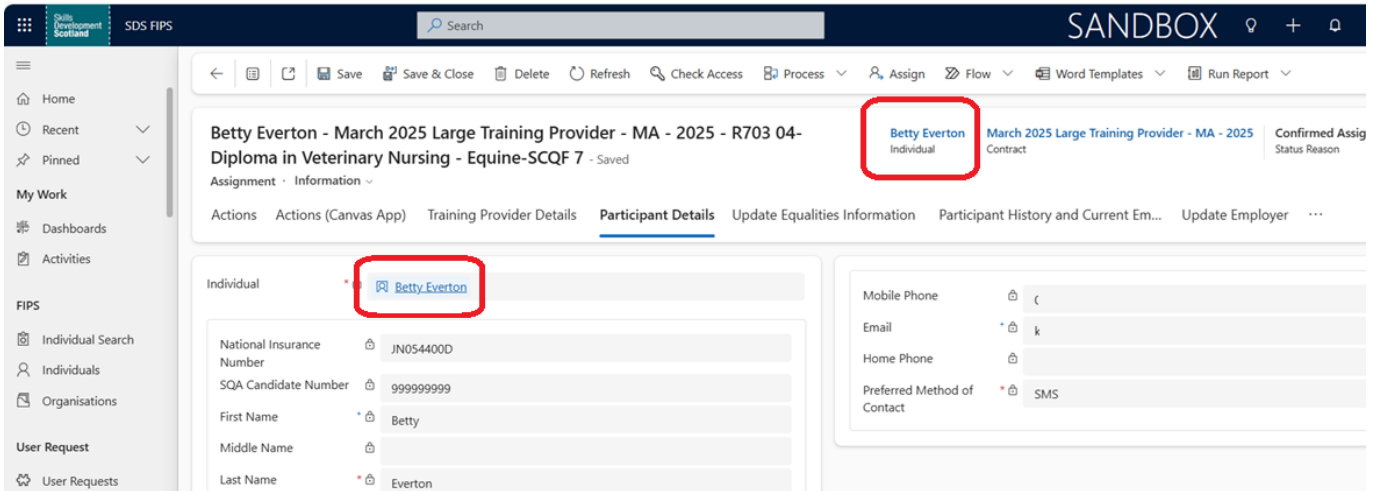


2. Search or filter the records using the filtering options, by clicking on the field header you want to filter on and inputting the relevant details. The "Filter by Keyword" search box can also be used:

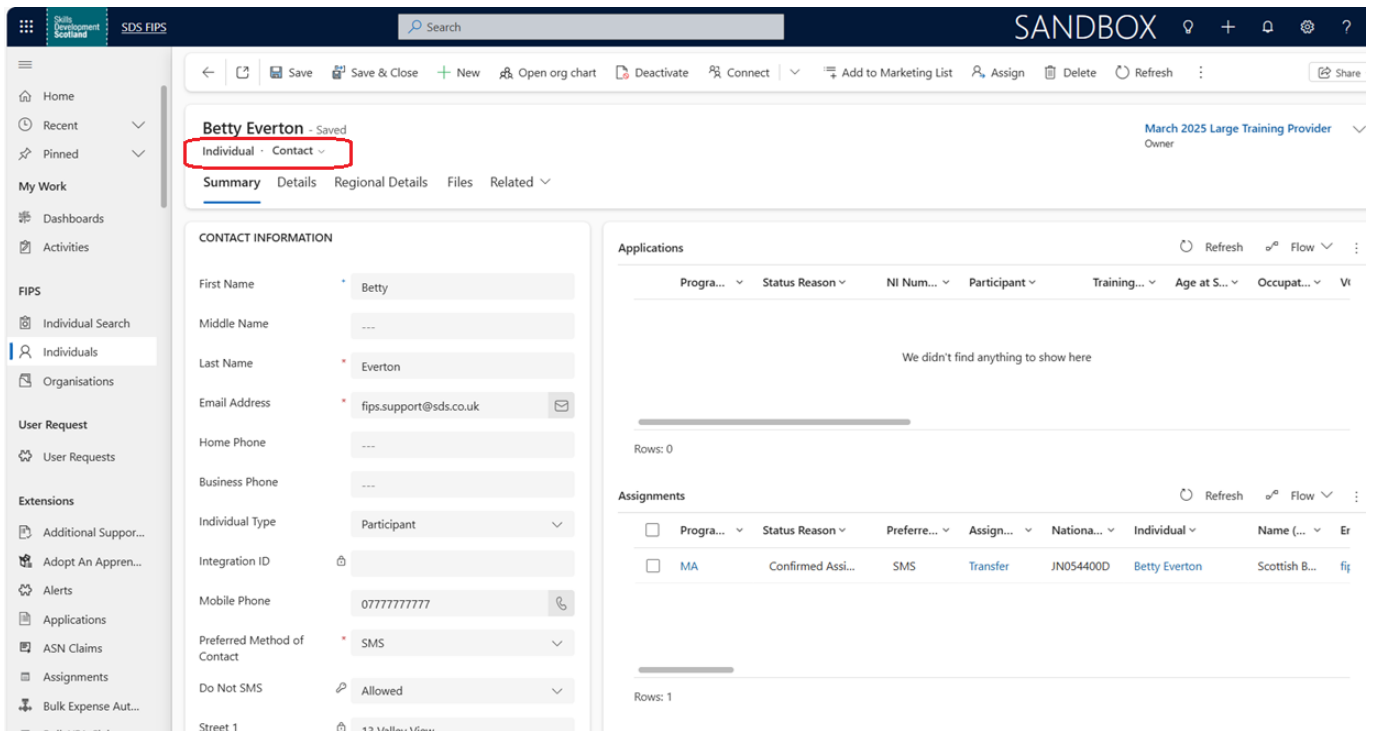


- To open the Individual Contact record, double click on the row or click on the full name hyperlink. The individual contact screen will open.

3. The Individual Contact screen can also be accessed within an assignment by selecting the hyperlink of the individual's name at the top of the record and within the Participants Details tab:



4. When the individual record opens, ensure the form view is set to "Individual: Contact":



- Name, email address, contact numbers, preferred method of contact (PMOC) and home address can all be amended within the Summary tab. Gender and Scottish Candidate Number (SCN) can be amended within the Details tab.

Betty Everton - Saved
Individual · Contact ▾

Summary Details Regional Details Files Related ▾

CONTACT INFORMATION

First Name * Betty

Middle Name ---

Last Name * Everton

- SCN – If this was not entered at the application stage, SCN can only be added within this individual screen. It cannot be added / edited in the assignment.
- The Date of Birth and National Insurance Number fields display the padlock symbol and cannot be changed within the individual screen. This information can be updated by the Provider using Change of Circumstance entity on FIPS.
- The Preferred Method of Contact (PMOC) is a mandatory field and can only be changed within this screen. Click on the field and select either SMS or Email from the dropdown menu. If the PMOC is changed, this will mean any future communications coming from FIPS will be sent via the updated PMOC details.
- When a change is made to an email address, FIPS will automatically send an Email Address Validation email to the email address at the point of update. The individual is required to respond in order to validate their email address. The status of the email address validation can be viewed under the Details tab of the individual contact record, in the “Email Validation Details” table.

Betty Everton - Saved March 2025 Large Owner

Individual · Contact ▾

Summary Details Regional Details Files Related ▾

compliance settings will be sent. Commercial emails from Real-time Journeys using a Restrictive mode compliance setting will not be sent.

EMAIL VALIDATION DETAILS

Date Validation Email Sent	🗓️ 30/10/2025
	🕒 09:51
Date Validation Email Received	🗓️ 30/10/2025
	🕒 09:52
Validation Email Response Received	🗓️ Email Okay
Validation Email Status	🗓️ Validated

5. To make any changes to participant details, click into the relevant field to edit the details. Once changes have been made, click on Save on the top ribbon menu.

Participant Address Update

- To amend the participant home address, click into the Summary tab and scroll down to the “Address Search / Update” button:

Betty Everton - Saved
Individual · Contact ▾
Summary Details Regional Details Files Related ▾

Contact

Do Not SMS Allowed ▾

Street 1 13 Valley View

Street 2 Clovenfords

Town/City GALASHIELS

Post Code TD1 3NG

County Selkirkshire

Address Search / Update

- Address Line 1 is where the address search is performed. Street name, house name, house number, postcode or a combination of this information can be used to search. In this example, “Haymarket Terrace” has been entered into Address Line 1. Relevant results will be displayed and can be drilled down to reveal more results by using the arrow. Select the address required. The other address fields will be populated automatically once selected. Click on Update Address to update the record with the new details.

Hide Address Search / Update

haymarket terrace
34 results

Haymarket Terrace, EDINBURGH, EH12 132 items ▾

Haymarket Centre, LEICESTER, LE1 7 items ▾

11 Old Saltwood Lane, Saltwood, HYTHE, Kent, CT21

Haymarket Cottage, 11 Old Saltwood Lane, Saltwood, HYTHE, Kent, CT21

Haymarket, Little Waldingfield, SUDBURY, Suffolk, CO10 7 items ▾

Architects Journal, 3 Queensbridge, NORTHAMPTON, NN-

Architects Review, 3 Queensbridge, NORTHAMPTON, NN-

- Once selected, the updated address will be displayed within the Summary tab of the individual record and within any related assignments, under the Participant Details tab.
- The address lookup comes from an external database. When new postcodes / addresses are added to this, FIPS may not contain the new data immediately which results in the list not being fully up to date at all times. In such instances, the FIPS Support Team will need to manually edit the address details for an individual at the request of the Provider. Requests can be raised via the User Requests entity on the workplace menu.

Applications / Assignments

- Under the Individual Contact view there is a table that shows Applications / Assignments / Archived Assignments for a participant. Providers will only be able to view records owned and created by their organisation. Shown below is an example of a participant individual record that has a draft application, an active assignment and no rejected or leaver archived assignments. Double clicking on the white area of the row will take you into that specific record to view it. Any link in FIPS that is blue is a hyperlink and will take you to a specific screen or reference table.

CONTACT INFORMATION

First Name: Betty
Middle Name: ---
Last Name: Everton
Email Address: fips.support@sds.co.uk
Home Phone: ---
Business Phone: ---
Individual Type: Participant
Integration ID: ---
Mobile Phone: 0777777777
Preferred Method of Contact: SMS
Do Not SMS: Allowed
Street 1: 22/1 Haymarket Terrace
Street 2: ---
Town/City: EDINBURGH
Post Code: EH12 5JZ

Applications

Progra...	Status Reason	NI Num...	Participant	Training...	Age at S...	Occupat...	VQ Level	Qualific
<input type="checkbox"/>	Draft	JN054400D	Betty Everton					

Rows: 1

Assignments

Progra...	Status Reason	Preferre...	Assign...	Nationa...	Individual	Name (...)	Email (...)	Home P
<input type="checkbox"/>	MA	Confirmed Assi...	SMS	Transfer	JN054400D	Betty Everton	Edinburg...	fips.supp...

Rows: 1

Assignments - Archived

Statu...	Preferre...	Assign...	Nationa...	Individual	Name (...)	Email (...)	Home P...	Mobile ...	Age Gro
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Ma didn't find anything to show here.

- Any draft applications which have not been submitted will be displayed within the applications section. Assignments with the following statuses will show in the assignment section – Draft Assignment, Manual Approval Required, Unconfirmed, Confirmed, Leaver Active. Assignments that are at Leaver Archived or Rejected status will be displayed in the Assignments - Archived section.

If you are unable to make updates to any of the participant information described in this guide, contact the FIPS Support team using the User Requests entity for support.