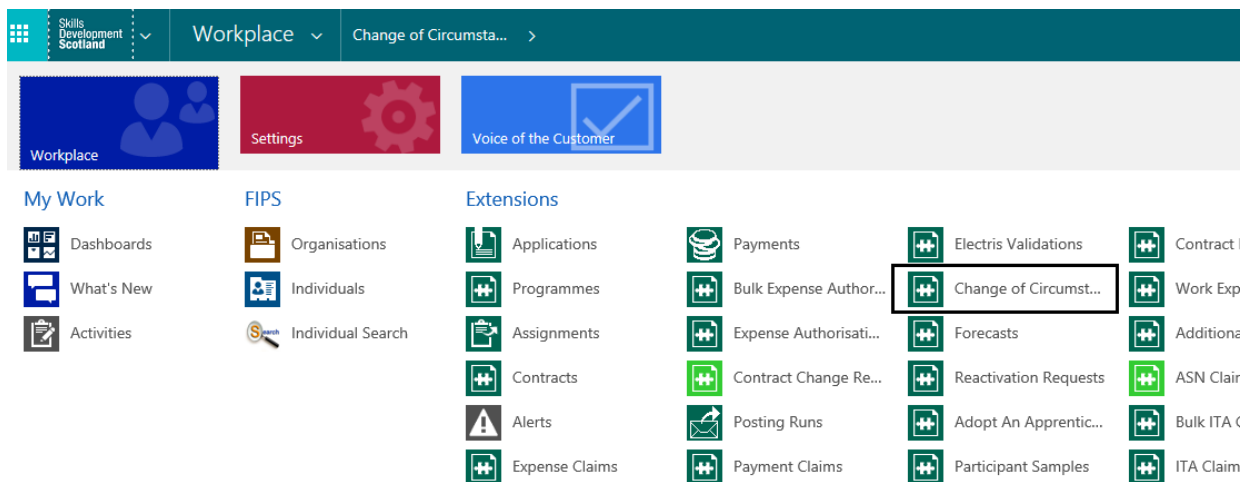


FIPS QUICK START GUIDE

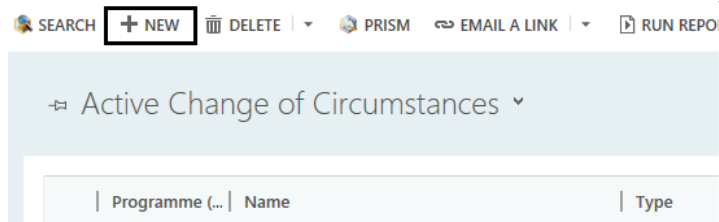
Change of Circumstance – Date of Birth

The change of circumstance (COC) entity on FIPS allows Training Providers to make changes to specific candidate information. The following data can be amended via the Change of Circumstance entity: Start Date, Date of Birth, National Insurance Number and Qualification. This guide will provide guidance on how to update a Date of Birth.

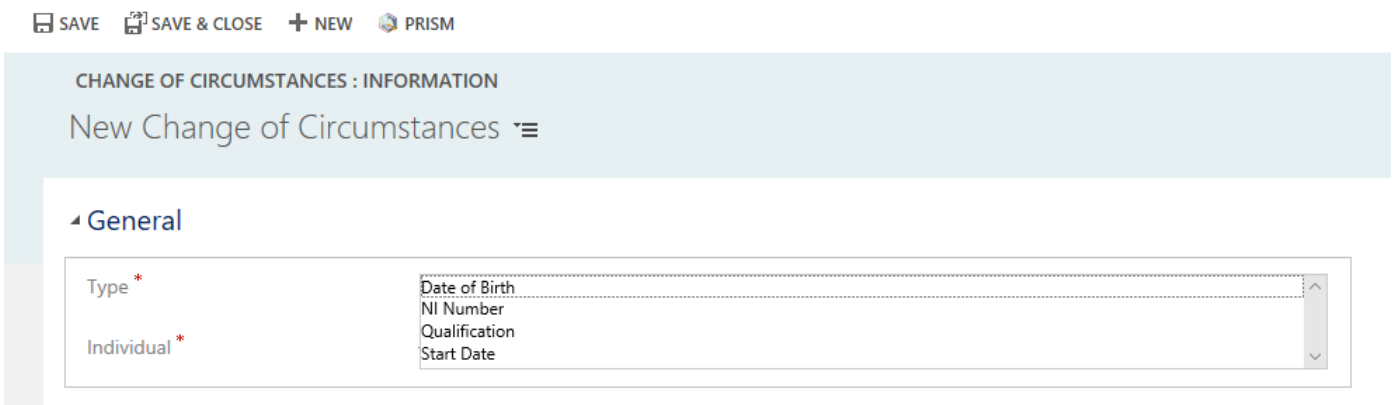
1. From the Workplace, navigate to the Change of Circumstances entity:



2. Within the COC screen, click on “+ New” which will open the Change of Circumstances form:



3. Type and Individual are mandatory fields – mandatory fields are depicted with a red asterisk (*). Within the “Type” field, click into this and select “Date of Birth” from the list displayed:



4. Once this has been selected, additional fields will appear on the right-hand side of the page:

General

Type *	Date of Birth	Change of Date of Birth
Individual *	New Date of Birth *
		Date of Birth Process Trigger
		Parent Change of Circumstances A

5. Click into the individual field and use the look up icon to expand the drop-down list. Select the “Look Up More Records” hyperlink which will bring up an additional search box:

General

Type *	Date of Birth												
Individual *	<table border="1"> <tr> <td>Auris SERI</td> <td>25/09/2000</td> </tr> <tr> <td>B Anderson</td> <td>10/10/1995</td> </tr> <tr> <td>Test 1</td> <td>22/04/1995</td> </tr> <tr> <td>Test 2</td> <td>04/09/2000</td> </tr> <tr> <td>Test 3</td> <td>23/06/1999</td> </tr> <tr> <td>Test 4</td> <td>08/12/1993</td> </tr> </table> <p>Look Up More Records</p> <p>10 results + New</p>	Auris SERI	25/09/2000	B Anderson	10/10/1995	Test 1	22/04/1995	Test 2	04/09/2000	Test 3	23/06/1999	Test 4	08/12/1993
Auris SERI	25/09/2000												
B Anderson	10/10/1995												
Test 1	22/04/1995												
Test 2	04/09/2000												
Test 3	23/06/1999												
Test 4	08/12/1993												

6. Within the search box, search for the individual using the wild card function (*Firstname* Surname*) and hover over the white space on the left-hand side of the name. This will display a check box. Click to select and then “Add”:

Lookup Record ✕

Enter your search criteria.

Look for: Individual Show Only My Records

Look in: Individuals Lookup View

Search: *test*

	Full Name ↑	National Insu...
<input checked="" type="checkbox"/>	Jo Test	JH345213A
	Jo test	JH231565A
	JoEF test	JH987865A
	John Test	JS223545A

1 - 35 of 35 (1 selected) Page 1

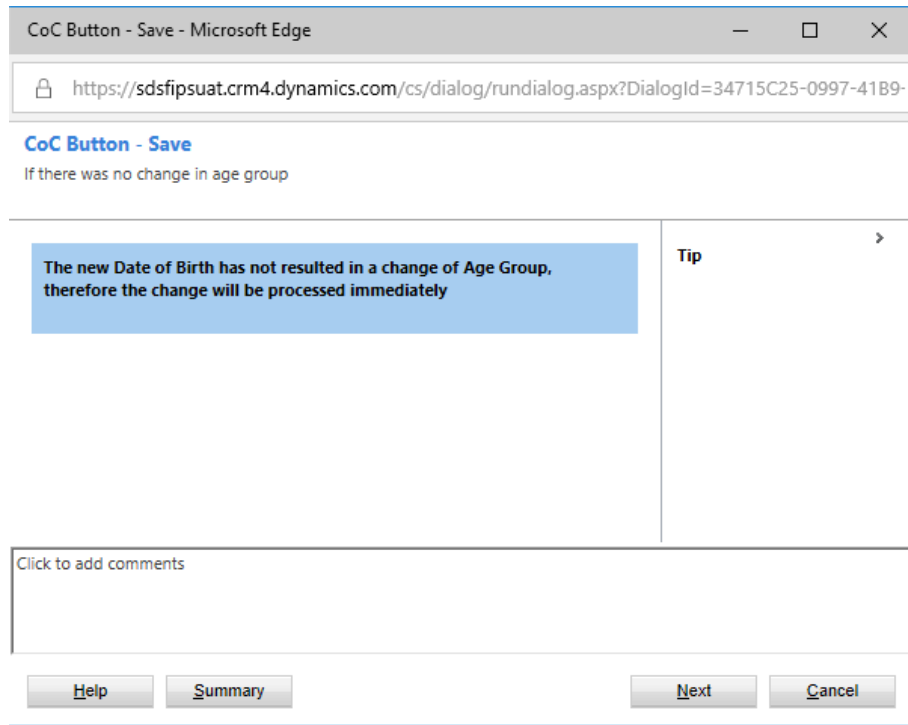
New
Add
Cancel
Remove Value

7. Once selected, the current details will be displayed on the right-hand side of the screen:

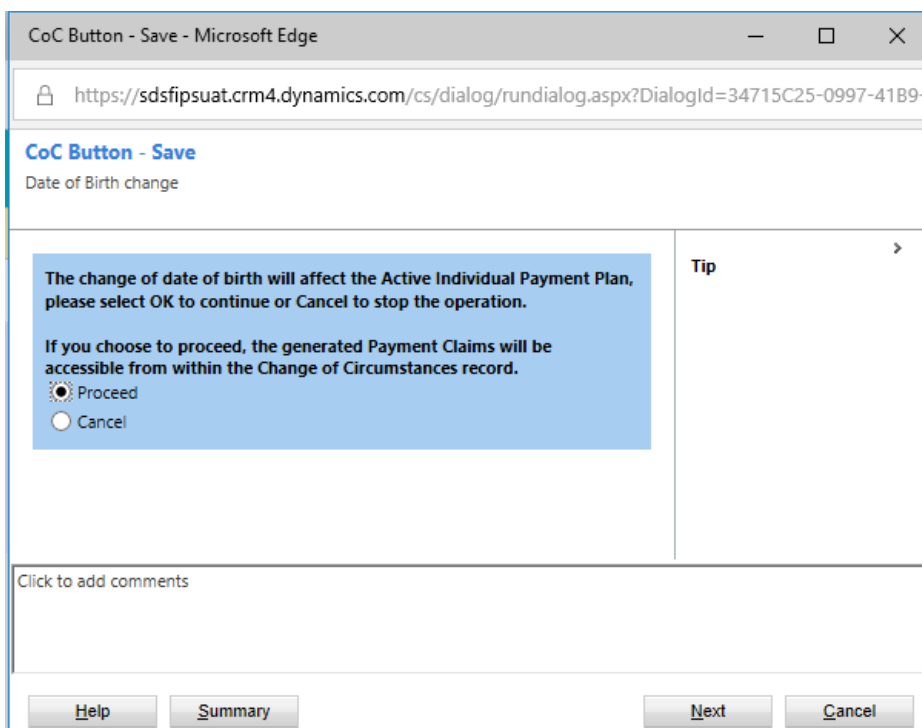
8. To update the Date of Birth, click into the “New Date of Birth” field and enter the correct date of birth in the required format DD/MM/YYYY or use the calendar option at the right of the field to select the date. Once added, click save. The save icon (disc) will appear at the bottom of the screen:

9. Once saved, a Submit button will appear at the top of the screen. Click on Submit to save the changes:

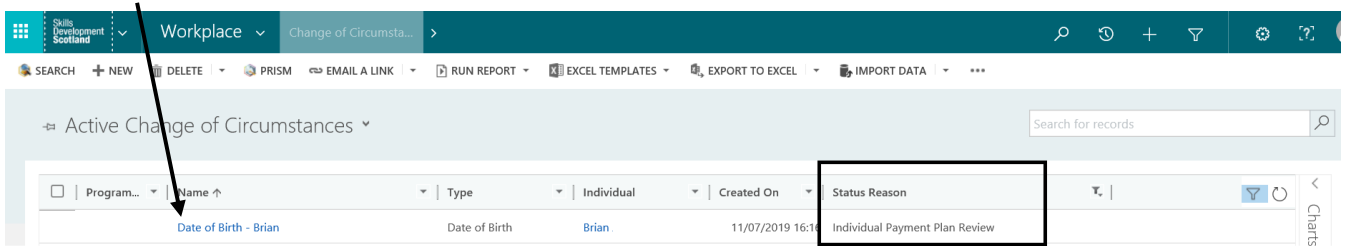
10. A dialog box will appear on screen summarising the change – it will display a message that the record will be set to submitted and the process will be run for the date of birth change. Click Next. At this stage, Cancel can be selected which will cancel the COC request and the details will not be changed.
11. If the change does not impact on the training category and there is no change required to the funding, the following message will appear, and the date of birth will be updated on the assignment. The status of the submitted Change of Circumstance will now show as “Completed”:



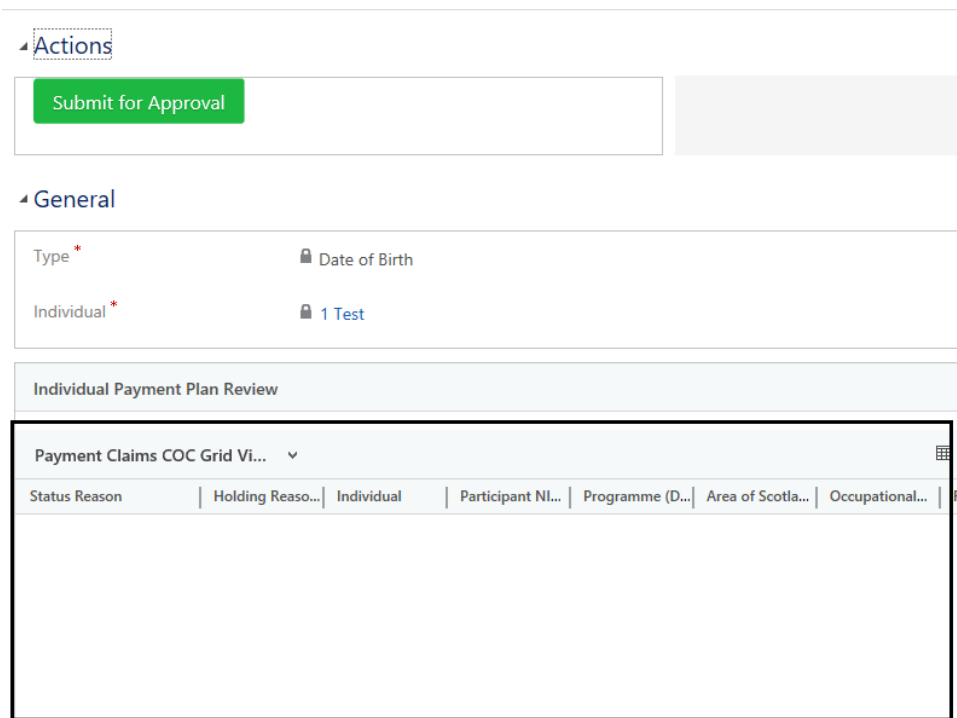
12. If the change of Date of Birth does impact the funding for the individual, the dialog box will display the below. Select Proceed, then Next to submit the change:



13. The COC should be at 'Individual Payment Plan Review' status. Re-open the record via the Change of Circumstances entity within the 'Active Change of Circumstances' view. Click on the hyperlink to open the Change of Circumstance:



14. When the record is at Individual Payment Plan Review status, FIPS is performing checks against the contracted volumes for the Training Provider contract. It is only when these checks are complete that the new Individual Payment Plan is displayed in the Change of Circumstance form. This will be blank (shown below) until that process is complete:



Do not click "Submit for Approval" until the Individual Payment Plan Review area is populated with the new Individual Payment Plan. The time taken for the new IPP to be displayed will vary due to several factors, therefore, users should wait at least one hour before clicking on Submit for Approval.

If the Change of Circumstance is submitted without the new Individual Payment Plan appearing on the record, it will be rejected by SDS and the Training Provider will have to submit a new COC.

15. When the new Individual Payment Plan is visible it should be reviewed to ensure it is accurate. Adjustments can be made prior to submission:

↳ Actions

Submit for Approval

↳ General

Type *	Date of Birth	Change of Date of Birth
Individual *	FIPS TEST	New Date of Birth *
Individual Payment Plan Review		Current Details
Payment Claims COC Grid Vi...		First Name +
Status Reason	Holding Reason...	Individual
Pending	FIPS Test	.. TN000412M MA Highlands &...
Pending	FIPS Test	.. TN000412M MA Highlands &...
Pending	FIPS Test	.. TN000412M MA Highlands &...
Pending	FIPS Test	.. TN000412M MA Highlands &...
		Last Name *
		Test
		Date of Birth
		25/05/1999
		NI Number
		TN000412M

15. To mark any milestones of the same value as achieved, double click on the claim within the Individual Payment Plan Review grid. On the next screen, click on the 'Mark as Achieved' button. A dialog box will appear, click Next to proceed:

PAYMENT CLAIM : TRAINING PROVIDER INFORMATION FORM

M001 - SCQF 5-GN86 22-Trees and Timber-Trees and T...

↳ Submission

Activate Evidence Upload

Mark As Achieved

↳ General

Name	M001 - SCQF 5-GN86 22-Trees and Timber-Trees and Timber-Revision-2
Owner *	SERI Regression Testing
Individual Payment Plan *
Claim Type *	Milestone
Milestone Number *	1
Claim From *	05/03/2019
No. of Units	2
Expected Claim Date *	04/06/2019
Date of Evidence

Re-open the Change of Circumstance form and when the required changes have been made and the IPP is displayed in the grid, it can now be Submitted for Approval. Once the Change of Circumstance has been reviewed by SDS and approved, the individual record and assignment will display the new details.