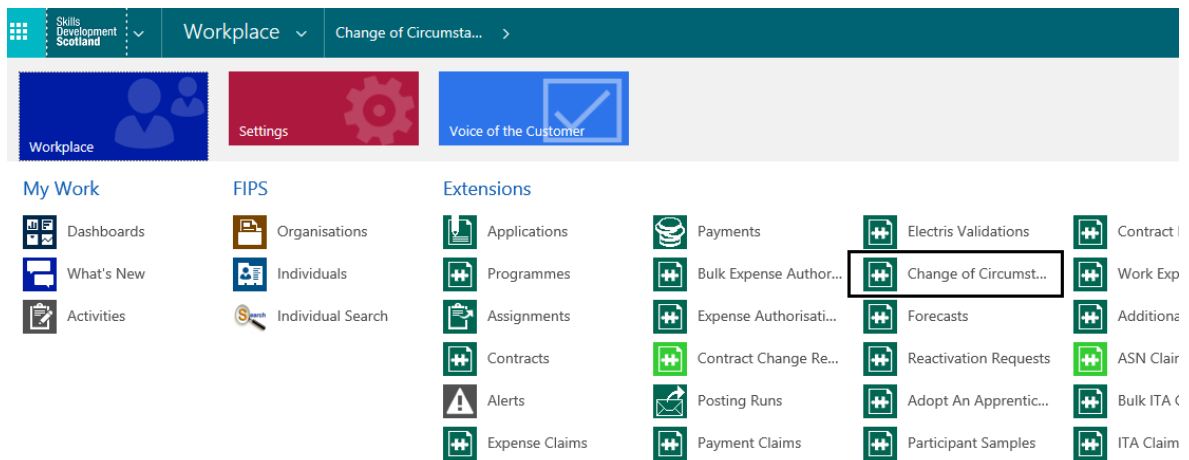


# FIPS QUICK START GUIDE

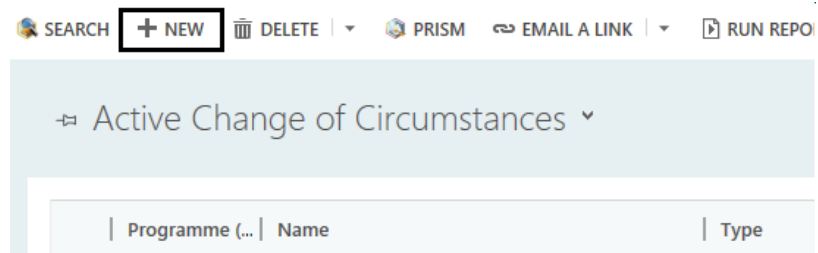
## Change of Circumstance - Qualification

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 Qualification details for an assignment.

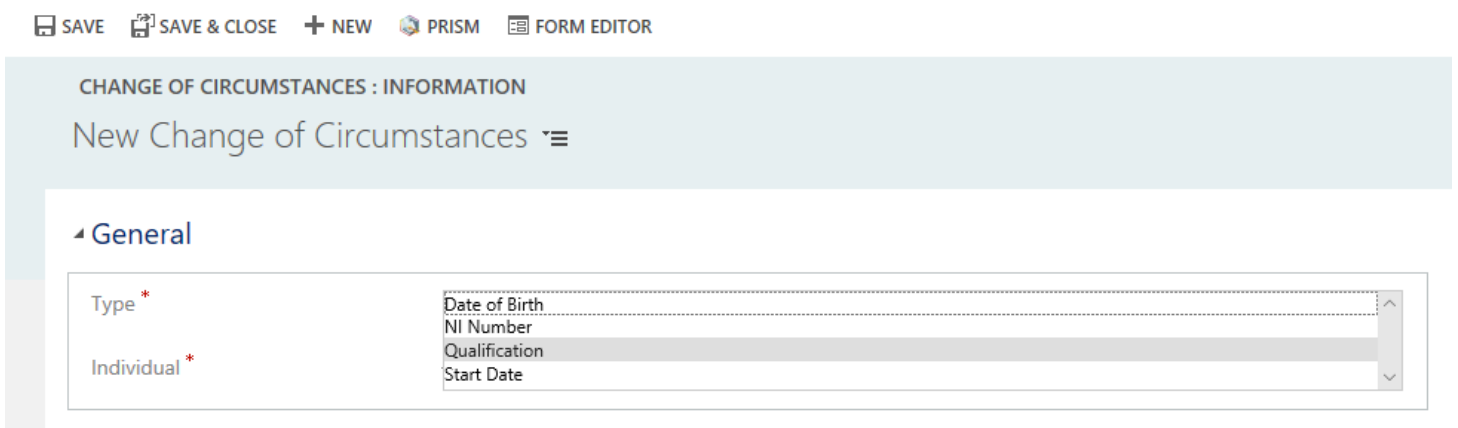
1. To update an individual’s Qualification on FIPS, select Workplace then Change of Circumstances entity:



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 “Qualification” from the list displayed:



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

General

Type *	Qualification	Change of Qualification
Assignment *		New Qualification *

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 *	Qualification												
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><a href="#">Look Up More Records</a></p> <p>10 results <span style="float:right">+ New</span></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 click “Add”:

Lookup Record

Enter your search criteria.

Look for: Assignment  Show Only My Records

Look in: Assignment Lookup View

Search: \*FIPS\*

Name	Registered Organ
<input checked="" type="checkbox"/> FIPS1 Test - SERI Regression Testing - MA - 2018...	SERI Regression Test
FIPS Test - SERI Regression Testing - MA - 2018 ...	SERI Regression Test
FIPS TS-EF-00102 - EFMI Regression Test - EF - 2...	EFMI Regression Tes
FIPS TS-EF-00103 - EFMI Regression Test - EF - 2...	EFMI Regression Tes

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New Add Cancel Remove Value

7. When the person has been selected, the individual’s current details will appear on the right-hand side of the screen:

8. To update the Qualification, click into the “New Qualification” field and search for the correct qualification using the “Look Up More Records” function. The wildcard function can be used to search. Search for either part or the full name of the qualification. Once selected, save the COC form:

9. Once saved, a Submit button will appear at the top of the form. Click this to submit the changes:

10. A dialog box will be displayed summarising the changes. Click on Next to complete the submission or Cancel if the changes are no longer required. Clicking Cancel will mean the COC form remains in Draft status.

11. A change to the qualification will attach a new Individual Payment Plan within the related assignment. The following message will appear, click Next to proceed. The status of the submitted Change of Circumstance will show as "Individual Payment Plan Review":

**12. The Change of Circumstance will now re-open and display the following screen. The status will show as “Individual Payment Plan Review”:**

**13. When the COC is at this status, FIPS is performing background checks against the contracted volumes for the Training Provider contract. It is only when these checks are complete that the Individual Payment Plan for the new qualification is displayed in the Individual Payment Plan Review grid:**

**Do not** click “Submit for Approval” until the Individual Payment Plan Review grid (as above) is populated (this shows as blank in the screenshot) with the new Individual Payment Plan. The time it takes for this data to be displayed will vary due to several factors, therefore, Training Providers should wait at least **one hour** before submitting the COC for approval.

If the Change of Circumstance is submitted without the new Individual Payment Plan appearing within the grid, it will be rejected by SDS and the COC will need to be entered by the Training Provider again.

**Please note:** If you are creating the Change of Circumstance to change the qualification from a SVQ level to an SCQF code, the Individual Payment Plan Review grid **will not populate** with the new payment plan. **In these instances only, Submit for Approval without the new Individual Payment Plan being displayed and SDS will manually update these.**

**14. When the new Individual Payment Plan is displayed, you can then review the payment plan for accuracy and make any adjustments as required:**

The screenshot shows a web interface with a 'Submit for Approval' button in green. Below it is the 'General' tab. On the left, there is a table titled 'Payment Claims COC Grid Vi...' with columns: Status Reason, Holding Reaso..., Individual, Participant NI..., Programme (D..., Area of Scotla..., Occupational..., and Fr. The table contains three rows, all with 'Pending' status. A scroll bar is visible below the table, with an arrow pointing to it from the instruction box below.

Status Reason	Holding Reaso...	Individual	Participant NI...	Programme (D...	Area of Scotla...	Occupational...	Fr
Pending		FIPS1 Test	JH123456A	MA	Lowlands &...		
Pending		FIPS1 Test	JH123456A	MA	Lowlands &...		
Pending		FIPS1 Test	JH123456A	MA	Lowlands &...		

Use the scroll bar to check the new IPP details within the Payment Claims grid, including milestone order and values.

15. To mark any milestones as achieved, double click on the claim within the Payment Plan Review grid. A new screen will open and a 'Mark as Achieved' button will be displayed. Click on this to mark that claim as achieved. A dialog box will appear, click Finish to proceed and the claim will then show as inactive / read only:

The screenshot shows a web interface for a 'PAYMENT CLAIM : TRAINING PROVIDER INFORMATION FORM'. The claim title is 'M001 - SCQF 5-GN93 22-Game and Wildlife Managemen...'. Under the 'Submission' tab, there are two buttons: 'Activate Evidence Upload' and 'Mark As Achieved'. The 'Mark As Achieved' button is highlighted with a red box. Below this is a 'General' section with the following details:

Name	M001 - SCQF 5-GN93 22-Game and Wildlife Management: Game Rearing-Game & Wildlife Management-Revision-1
Owner *	SERI Regression Testing
Individual Payment Plan *	
Claim Type *	Milestone
Milestone Number *	1

At the bottom of the screen, there is a 'Date of Evidence' field and a status bar that reads 'Inactive' on the left and 'Read only' on the right. A red arrow points from the 'Mark As Achieved' button to the 'Inactive' status.

16. Navigate back to the Change of Circumstance record once all required changes have been made and click on Submit for Approval. A dialog box will appear advising that the request will be submitted to SDS for approval. Click Next and Finish to proceed. The COC now will show a status reason of "Submitted".

17. The COC is now reviewed by SDS. This can take a few days to complete. Once approved / rejected, an alert will be generated on the Training Provider dashboard / alerts entity, advising of the change in status. If approved the trainee assignment will be updated and the new qualification and Individual Payment Plan details will be displayed.