

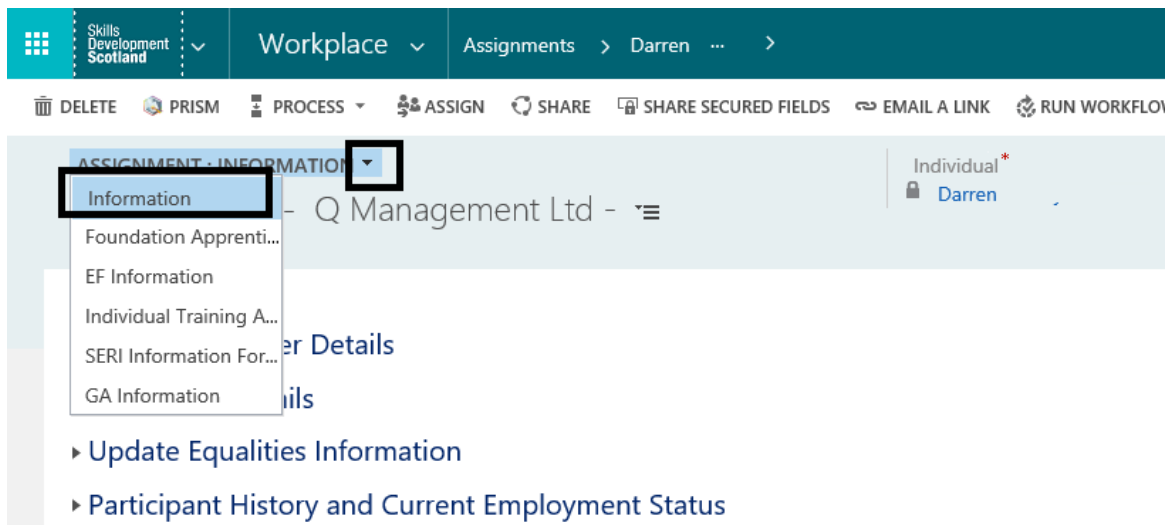
# FIPS QUICK START GUIDE

## Creating an MA Trainee Application on FIPS

The Application is the second stage to creating an MA assignment on FIPS, following on from the Individual Search. To enable you to register an MA trainee the following documents are required – Training Agreement & Equality Monitoring Form.

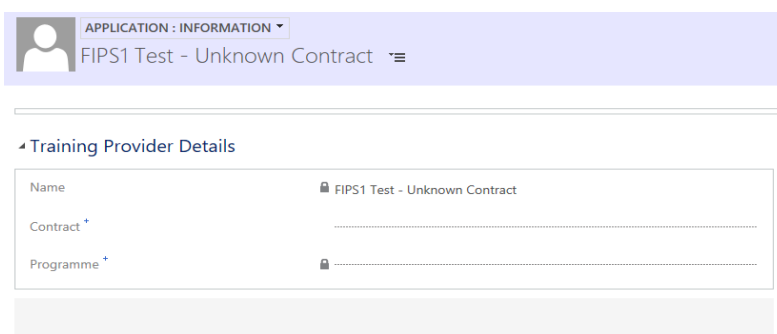
### Entering an Application – points to note:

- There are multiple fields containing a blue cross which indicates they will become mandatory prior to submitting the application.
- The application can be saved as a draft until you are ready to complete and submit the application to an assignment.
- For any fields displaying the padlock symbol, FIPS will auto-populate these locked fields during the application process.
- For all MA applications / assignments, the view at the top of the page should show as “Application: Information”. If this is showing a different programme option, click on the dropdown icon and select the Application: Information view:



### Training Provider Details



1. The “Name” field will display the padlock symbol. This will be populated with the candidate name originally entered during the Individual Search stage and should also state “Unknown Contract”. This will update automatically once the contract has been selected in the next field.



The screenshot shows the 'Training Provider Details' form. The breadcrumb trail is 'APPLICATION : INFORMATION > FIPS1 Test - Unknown Contract'. The form has three fields: 'Name' (populated with 'FIPS1 Test - Unknown Contract' and a padlock icon), 'Contract' (with a blue cross icon), and 'Programme' (with a padlock icon).

2. Enter the Training Provider Contract name and search using the magnifying glass symbol. Select the required contract from the list displayed or select the blue “Look Up More Records” option to search for the contract if your company has more than one contract:

Training Provider Details

Name	FIPS1 Test - Unknown Contract	
Contract +	seri	
Programme +	<div style="border: 1px solid #ccc; padding: 2px;">  SERI Regression Testing - MA - 2018 30/03/2020         </div> <p style="text-align: center; color: #0070c0; margin-top: 5px;">Look Up More Records</p>	
1 result		



3. The “programme” field will also display the padlock symbol. Save the application and this field will be populated with the correct programme type (MA). The contract name should also update on the application header and within the “name” field to show the contract name:

APPLICATION : INFORMATION ▾

FIPS1 Test - SERI Regression Testing - MA - 2018 ☰

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Training Provider Details

Name	FIPS1 Test - SERI Regression Testing - MA - 2018	
Contract +	SERI Regression Testing - MA - 2018 	
Programme +	MA 	

### Participant Details

4. Individual - this field is pre-populated with the name entered at the Individual Search stage. If you need to modify this, click into the Individual Contact screen using the name hyperlink:

Participant Details

Individual + Aamarrah Milisic

This blue text is a hyperlink. Clicking this link will take you into the Individual Contact screen where the name can be changed. This change will update the application / assignment.

5. **Temporary NI Number Required** - the default for this field is “No”. If you require a temporary National Insurance number, click on the field to change this to yes. This will apply the locked symbol to the National Insurance Number field and FIPS will generate an NI number when the application is saved. The application cannot be saved until the gender field has been completed.

Participant Details

Individual +	FIPS1 Test
Temporary NI Number Required	Yes
NI Number +	🔒 TN000419M

System generated temporary NI number. Claims cannot be processed until this has been changed to an official NI number. This change is made using the Change of Circumstance entity.

6. **NI Number** – this field will be blank if the trainee has not been registered on FIPS before and the NI number was not included in the Individual Search. This is a free text box and the NI number should be input.

The following fields should be populated as follows:

Scottish Candidate Number (SCN)	Complete this if known. This is not a mandatory field.
Gender	Select the appropriate gender from the drop-down.
Mobile Number / Home Telephone Number	These fields default to No. To add a contact number, click into the field and select “Yes”. A free text box will be displayed for the number to be added.
Email Address	This is a mandatory field and must be completed prior to submitting the application.
Preferred Method of Contact	Select SMS or E-mail depending on the trainee preference. Validation messages will go out to the details entered. PMOC can be edited in the Individual Contact screen.

Participant Details

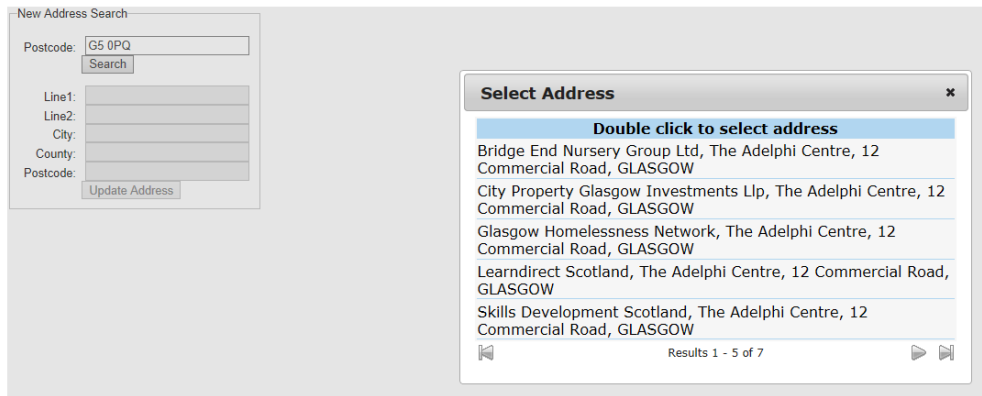
Individual +	🔒 Stuart
🔒 National Insurance Number	HH11110000Y
SQA Candidate Number	999999991
First Name +	Stuart
Middle Name	.....
Last Name +	Example
Gender	Male
📅 Date of Birth	03/08/1925

📞 Mobile Phone	🔒 07777777747
✉️ Email +	dummy@test.com
📞 Home Phone	01311111111
Preferred Method of Contact +	SMS

Locked symbol indicates that once data has been entered it cannot be edited in this screen. Red asterisk indicates a mandatory field.

**7. New Address Search - Use the Address Search / Update button to search the trainee home address if these fields are blank or need updated. Select the address from the list displayed and click “Update Address” to save.**

If the required address does not appear in the list displayed, select an address from the list and once submitted to an assignment, submit a Help Form to the FIPS Support Team to update. Supply the correct address and relevant trainee details for this to be manually changed.

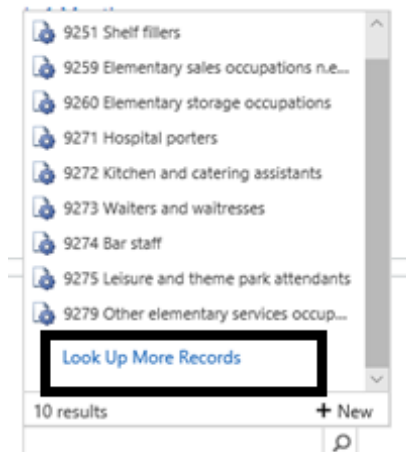


**Participant History and Current Employment Status**

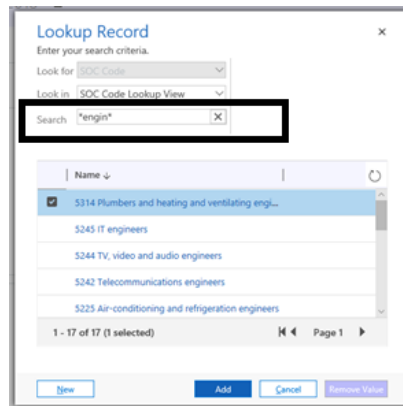
The following six fields should be populated as follows:

Employed	Pre-populated by FIPS as all MA’s must be employed.
Length of Unemployment	Mandatory field. Select from the drop-down list.
Current Role Length	Mandatory field. Select from the drop-down list.
Employed Length	Mandatory field. Select from the drop-down list.
Employment Status	Mandatory field. Select from the drop-down list.
Pre-Employment Status	Mandatory field. Select from the drop-down list.
SCQF Level Held	Mandatory field. Select from the drop-down list.
SOC 2010	Mandatory field. Select from the drop-down list.

For any of the drop-down fields listed above, if the option you require is not displayed, select the “Look Up More Records” hyperlink to display the search function which will allow you to search through all options held for that field.



The screenshot below shows the lookup for the SOC code. In this example, the wildcard (use of asterisks) is used to search for part of the word – Engineer – which will display all results containing this. From the results, click on the required option and “add”.



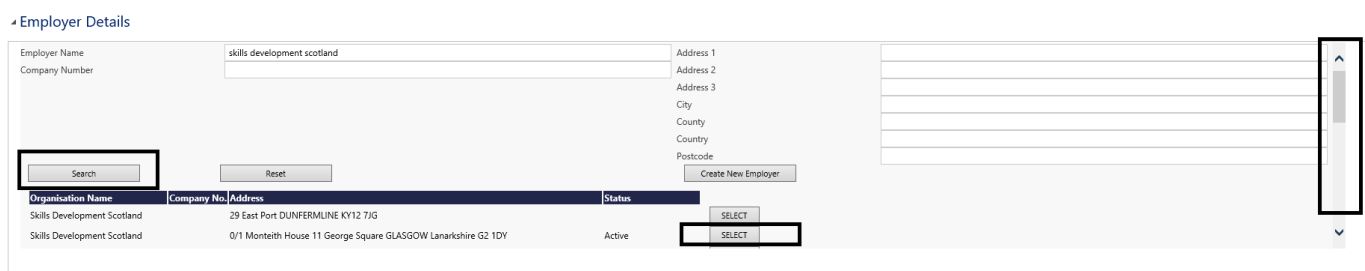
The following fields should be populated as per the below:

Job Title	Mandatory free text field.
Prior Achievement	Only enter prior achievement that is related to the qualification you are entering the participant on. Further guidance can be provided by your SIA.

### Employer Details

Before employer details can be added to the application, you are required to save the application by clicking on the ‘save’ icon at the bottom right hand corner.

- To search for an employer, click on the ‘Employer Search’ button and enter the Employer name and click on search. From the results, use the scroll bar at the right-hand side to view the available options. Choose the required employer by clicking the ‘select’ button.



If the required employer details are not returned, enter the postcode into the postcode field on the right-hand side and click on the ‘Create New Employer’. A pop up will appear asking you to confirm that you want to ‘Create new employer with the details entered’. A list of addresses for that postcode will be displayed, select the correct address.

### Employer Details

If the address details you require are not listed, select another address from the list and save. If there is a different company name attached to the address you require, disregard this. The Employer Name that you manually entered will overwrite the results. Once the application has been submitted to an assignment, submit a Help Form to the FIPS Support Team and ask that the address details are manually changed.

9. Once selected, the employer details will be automatically populated into the employer details section of the application. SIC Code (Standard Industrial Classification Code) is a locked field that can be disregarded. Priority Sector is a yes / no drop-down and this must be selected as this is a mandatory field.
10. For validation purposes (New start and claim validation), employer contact information is mandatory. Employer Contact Name, Email Address and one contact number are mandatory fields.

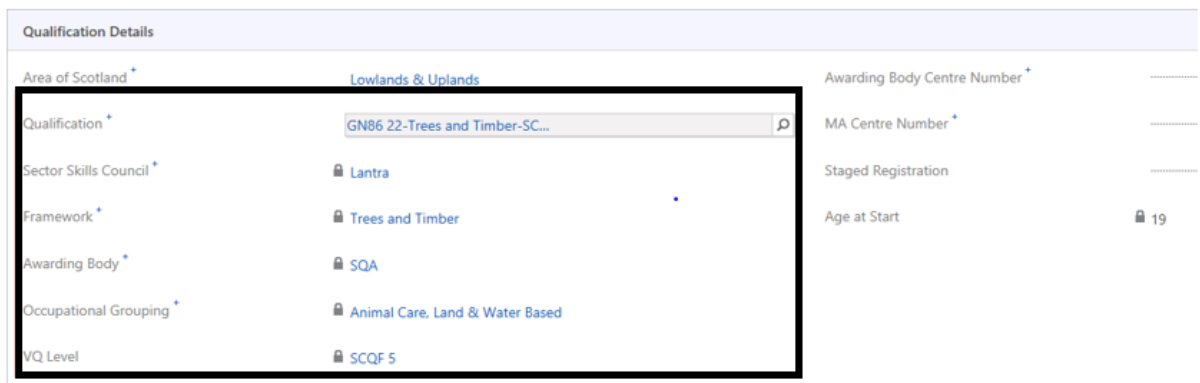
### Training Details

11. Start Date and Expected End Date - dates can be selected using the calendar which can be accessed by clicking on the field, or manually entered using the DD/MM/YYYY format:

#### Training Details

The following five fields should be populated as follows:

Area of Scotland	This is a mandatory field. Select the appropriate option from the lookup.
Qualification	Use the lookup function and scroll to “lookup more records” to search for the qualification. The wildcard function can be used to search for part of the qualification title – (*) when the qualification is selected, the following fields will be auto-populated:



The screenshot shows the 'Qualification Details' form. A red box highlights the dropdown menus for 'Area of Scotland' (Lowlands & Uplands), 'Qualification' (GN86 22-Trees and Timber-SC...), 'Sector Skills Council' (Lantra), 'Framework' (Trees and Timber), 'Awarding Body' (SQA), 'Occupational Grouping' (Animal Care, Land & Water Based), and 'VQ Level' (SCQF 5). Other fields like 'Awarding Body Centre Number', 'MA Centre Number', 'Staged Registration', and 'Age at Start' (19) are also visible.

Awarding Body Centre Number	Mandatory free text box. Enter the code into the field
MA Centre Number	Mandatory free text box. Enter the code into the field
Staged Registration	Not a mandatory field. This should only be completed when relevant.

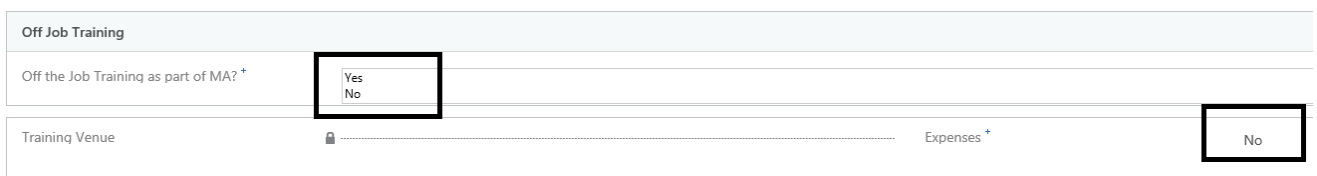
**12. The following fields will be automatically populated when the start date is entered:**

- Age at start
- Training Category

**13. Change to Training Category required – This field will automatically default to no but can be manually adjusted to yes. This will enable you to select a different training category (age group). Any records that have a change made to this field will go for Manual Approval by SDS.**

**14. Off the Job Training as part of MA – select Yes or No for this field. If yes is selected a Training Venue Search button will appear and Training Venue field becomes mandatory.**

**15. Expenses field will default to No. Change this to yes if required. Refer to the MA Programme Rules regarding eligibility:**



The screenshot shows four form fields: 'Off Job Training', 'Off the Job Training as part of MA?' (with a dropdown menu showing 'Yes' and 'No'), 'Training Venue' (with a search icon and a 'Training Venue Search' button), and 'Expenses' (with a dropdown menu showing 'No').

Training Venue should be added in the same way the Employer search was completed.

## Equalities Details

16. The Equality Monitoring Form should be used to populate this section. Follow the guidance on the form regarding destruction of relevant section of the form once the information has been entered to FIPS in line with GDPR legislation. Due to the sensitive nature of this data, Training Providers will be unable to view or report on this in FIPS:

### Equalities Details

Equalities	
Ethnic Group +	Transgender +
Sub Ethnic Group +	
Religion or Belief +	Care Experience +
Sexual Orientation +	
Impairment, health condition or learning difficulty? +	

17. Impairment, Health Condition or Learning Difficulty - select appropriate option from the drop-down menu. If Yes is selected, a sub menu will be displayed. The default for the sub menu is no; click to update to yes for any that apply:

Impairment, health condition or learning difficulty? +							
Yes							
Disability Detail							
Social Communication Impair	No	Visual Impairment	No	Hearing Impairment	No	Long Standing Illness	No
Mental Health	No	Specific Learning Difficulty	No	Physical Impairment	No	Other Disability	No
Prefer Not to Say	No						

## Training Provider Custom Data

18. Training Providers can use these free text fields to enter custom data to support the management of the contract:

### Training Provider Custom Data

Training Provider Reference 1	Training Provider Reference 5
Training Provider Reference 2	Training Provider Reference 6
Training Provider Reference 3	Training Provider Reference 7
Training Provider Reference 4	

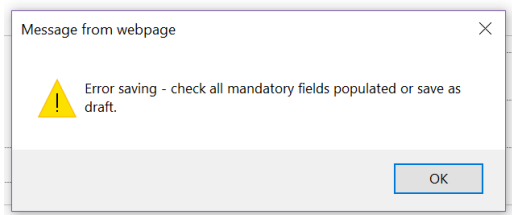
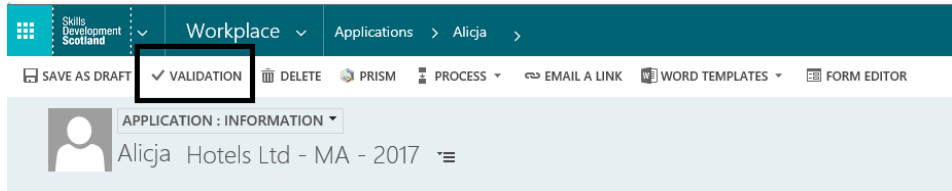
## General

19. These fields are not required to be completed by Training Providers but are used for SDS internal reporting purposes:

General	
ESF Dossier Number	Submission Date 04/11/2016
ESF Project	Assignment Generated
ESF Area Lowlands and Uplands	Status Reason Draft

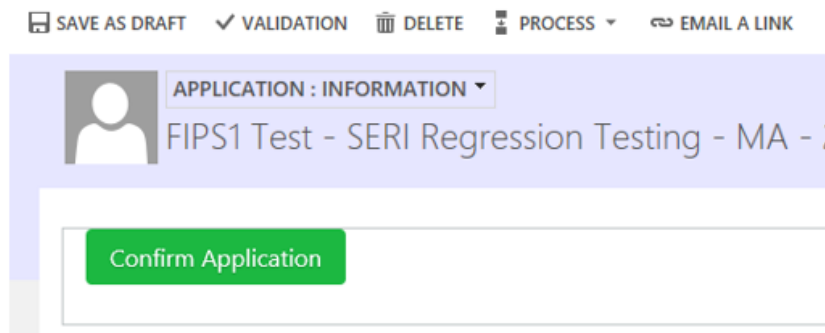


Once all required details have been added and the application is complete, click on save. You are now able to validate the application. Validation button is at the top of the application. If any mandatory fields have not been completed, clicking on Validation will highlight any incomplete fields.



There are certain fields that FIPS does not highlight when the data is missing. If you do not receive the "Confirm Application" button after clicking on Validation, check the following fields have been completed – Participant home address and contact number details, Training Category field, Off the Job Training area – ensure a training venue has been added.

**20. When the application is fully completed and ready to be submitted to an assignment, a "Confirm Application" button will appear at the top of the page:**



21. A dialog box will appear displaying a declaration. Read the declaration and select “Yes” to agree. Click “Next” and “Finish” on the following page to complete the application submission:

MA - Application - Dialog - Submit Application - Microsoft Edge

https://sdfsipsuat.crm4.dynamics.com/cs/dialog/rundialog.aspx?DialogId=DE9FD361-FCC8-48D

**MA - Application - Dialog - Submit Application**  
Accept Terms

appropriate section of the TA, and the Information Exchange and Co-operation Statement (data exchange statement).

- All details entered into FIPS have been thoroughly checked and are accurate.
- All programme information including Participant and employer data is stored in accordance with all applicable data protection legislation and requirements
- All hard copy records containing Participant information relating to equal opportunities has been disposed of in line with the MA Programme Rules after being entered into FIPS.

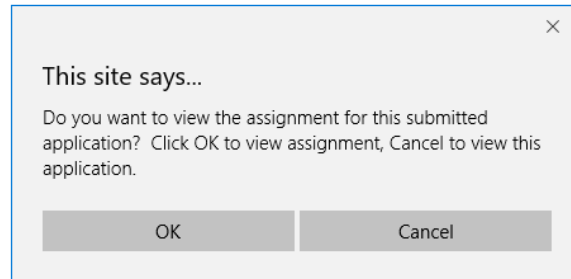
No  
 Yes

**Tip**  
Indicate yes or no.

Click to add comments

Help Summary Next Cancel

**22. A message will be displayed asking if you wish to view the assignment that has been generated from the submitted application. Click Ok to view the assignment:**



You should now follow the Submitting an Assignment quick start guide to complete the assignment submission process.