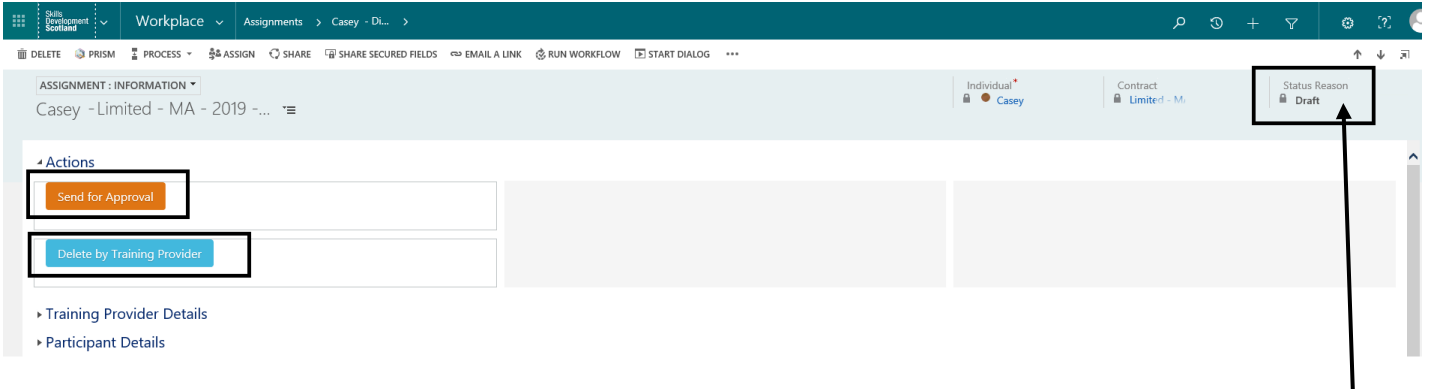


FIPS QUICK START GUIDE

Creating a New Assignment

This guide will cover how to enter an assignment into FIPS for an MA candidate. The guidance document for Entering an Application should be followed prior to this document.

1. Application is entered into FIPS by the Training Provider and submitted to an assignment. Assignment then exists in draft format:



Assignment in draft status. Status Reason shows as “Draft” and Actions show as “Send for Approval” and “Delete by Training Provider”.

2. All the details entered in the application will appear in the draft assignment. The headers for the assignment screen are shown in the screenshot below:

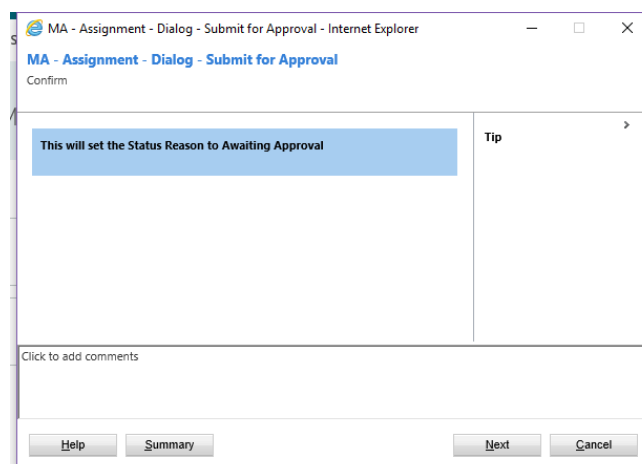


- The information entered for the individual should be reviewed when the assignment is in draft status. If there are any updates required to the data entered, this should be amended now, prior to the record being sent for approval:



Some details in draft assignment cannot be edited here (will show as padlocked) but can be edited in Individual Contact screen at this stage or after it record has been sent for approval. To view Individual Contact screen, click on the Individual hyperlink(s) shown above.

- The Individual Payment Plan is generated by FIPS when the draft assignment is created. The payment claims will show as Pending until the record is sent for approval / approved by SDS. The Attachments header in the draft assignment should be used to upload any relevant documents that relate to that participant. For Enhanced Funding candidates, the document for uploading Appendix 13 should be followed.
- Once the information has been checked for accuracy, it can be sent for approval. *If at this stage you do not intend to fully create an assignment for the candidate, "Delete by Training Provider" will set this to deleted – this process will be noted below.* When Submit for Approval is selected, this will set the record to either Manual Approval Required (by SDS) or Unconfirmed status when there is no previous training history for the individual so is auto-approved by FIPS. The following message will be displayed:



- Click on Next to complete the submission. When a record goes to Manual Approval Required, this assignment is reviewed by an SDS Contract Executive and approved or rejected. If approved, the assignment will show as "Unconfirmed" status – the validation process will now begin. For an assignment that was automatically approved by FIPS, the status will show immediately as Unconfirmed.

The validation process is covered in the Validation Process user guidance document. Please refer to this for further information.

7. If an assignment is rejected by SDS, you will receive an alert on the FIPS dashboard highlighting this. From the date of rejection, there are 15 calendar days to reactivate the record. Reactivating a rejected assignment will send it back for approval to SDS. Changes can be made while the assignment is in draft status prior to resubmission:

ASSIGNMENT : INFORMATION ▾
Amy People Limited - MA - ...

Individual
Amy Eliza

Contract
People Limited - MA -

Status Reason
Rejected

Actions

Delete by Training Provider ↔ Reactivate for Resubmission

Training Provider Details
Participant Details

Status Reason shows as “Rejected”. Actions tab show as Delete by Training Provider and Reactive for Resubmission. 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.

Training Provider
People Limited

Assignment Type

Owner
People Limited

Inactive

Read only

8. To view the reason for rejection, click into the Approval and Rejection header in the assignment.

ASSIGNMENT : INFORMATION ▾
Dale Adam - Training Ltd - MA - 2019 - ...

Individual
Dale Adam

Contract
Training Ltd -

Update Employer
Training Details
Update Training Venue
Individual Payment Plan
General
Approval and Rejection

Approval

Sent for Approval On	01/08/2019	Sent for Approval By		Time Since Sent for Approval (days)	0
Manually Approved On		Manually Approved By		Rejected On	01/08/2019
Approved On					

Manual Confirmation

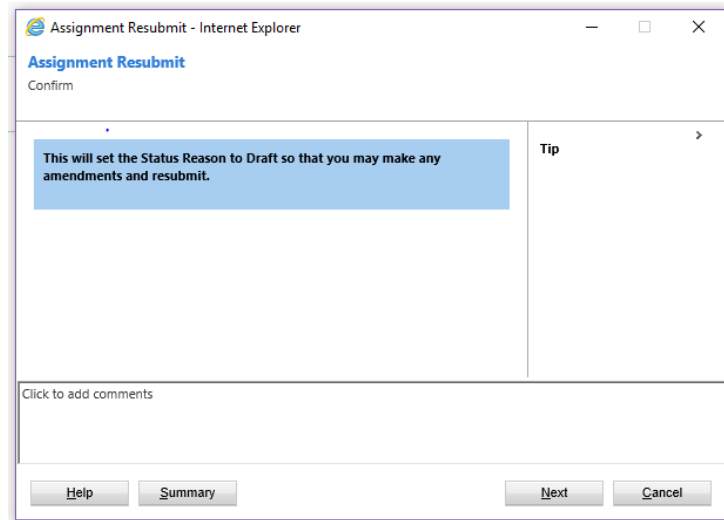
Reason for Manual Confirmation (where participant responded negatively to start message)

Most Recent Rejection

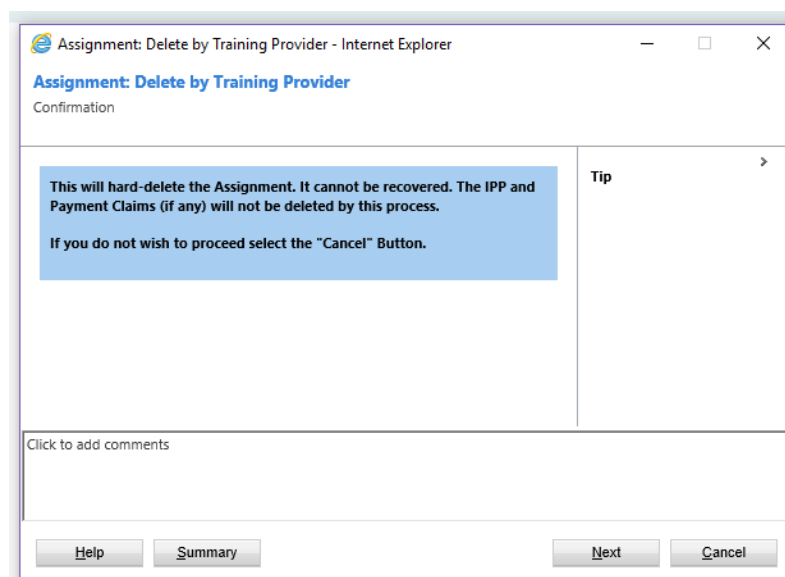
Rejection Reason Description	Candidates previous assignment for same framework not enhanced, candidate this time not new entrant to MA
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Reason for rejection and rejected on fields highlighted above. The reason for rejection is entered by SDS.

9. To send the record for review / approval again, click on Reactivate for Submission. The following message will be displayed. Click on Next to complete



10. The assignment will now go back to 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, either after it has been rejected or prior to submitting for approval, the “Delete by Training Provider” button should be used.
11. The following window will appear when the Delete by Training Provider button is selected. By clicking next, the assignment will be permanently deleted and cannot be resubmitted / edited by the Training Provider or SDS after this action has been processed:



Once an assignment has been approved the validation process begins. You should now refer to the Validation Process guidance document for this part of the process.