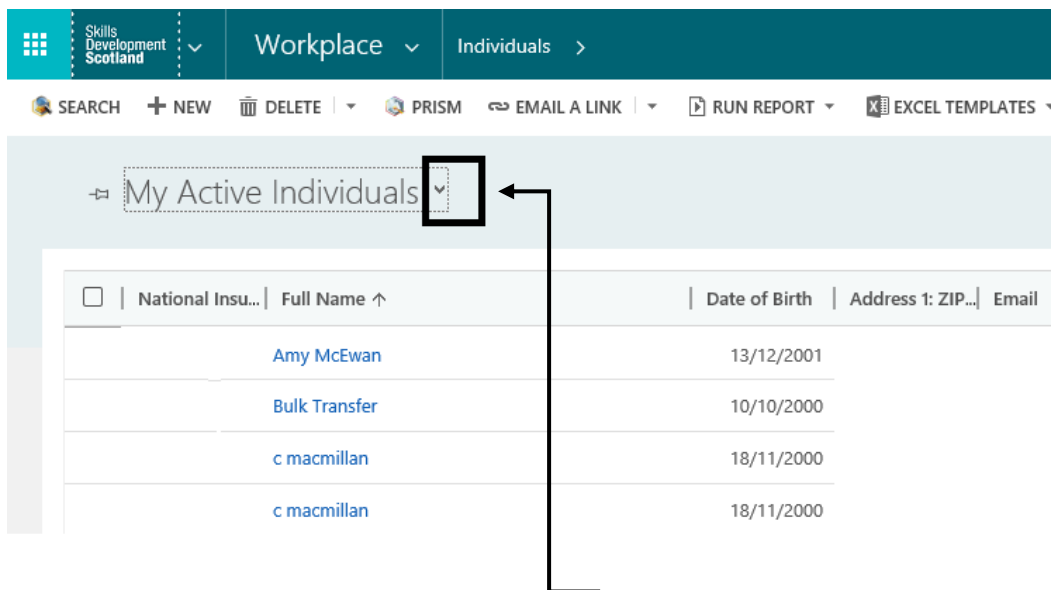


FIPS QUICK START GUIDE

Updating an Individual's Details

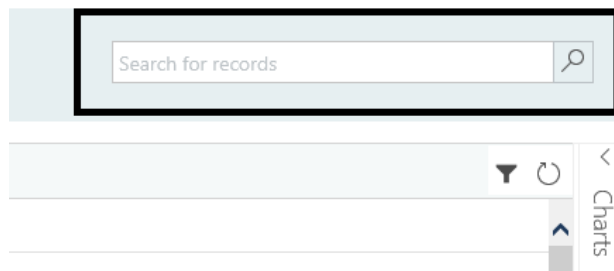
Individual Contact entity (Individuals) should be used to update and manage trainee personal data in FIPS. Any changes made in this screen automatically update the related assignment. Trainee name, email address, home phone and mobile number, home address, SQA candidate number (SCN) and preferred method of contact should all be amended in this screen.

1. An individual can be found on FIPS by navigating to Workplace, Individuals. This view will default to “My Active Individuals” however you can change the system view if required using the drop down:

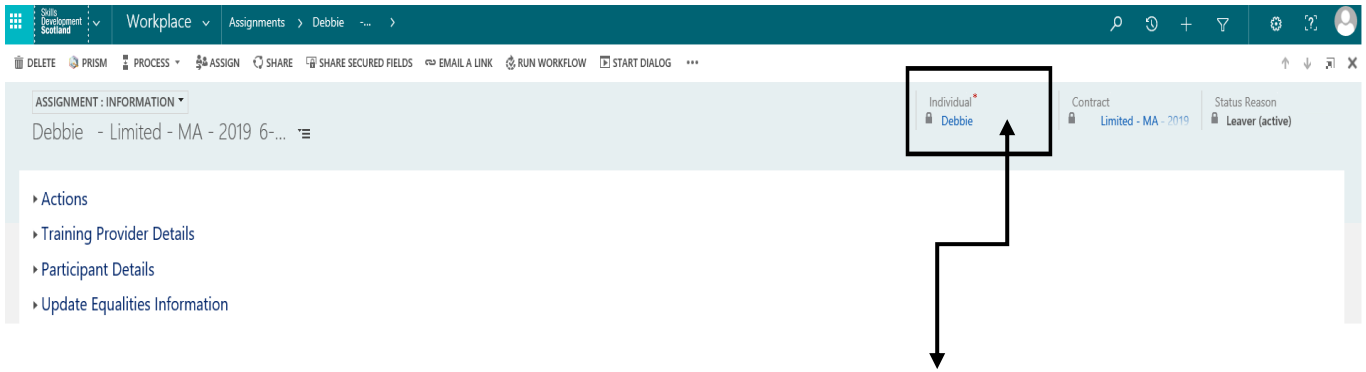


Dropdown arrow to change between views.

2. Use the index bar at the bottom of the screen (“All”, “#”, “A-Z”) to lookup the trainee or search the name or NI number in the search bar at the top right-hand side of the page. If using a trainee name, FIPS will only return the results that match the exact name entered, therefore it is best practice to use the wildcard function (Forename* Surname*) to bring up all results.

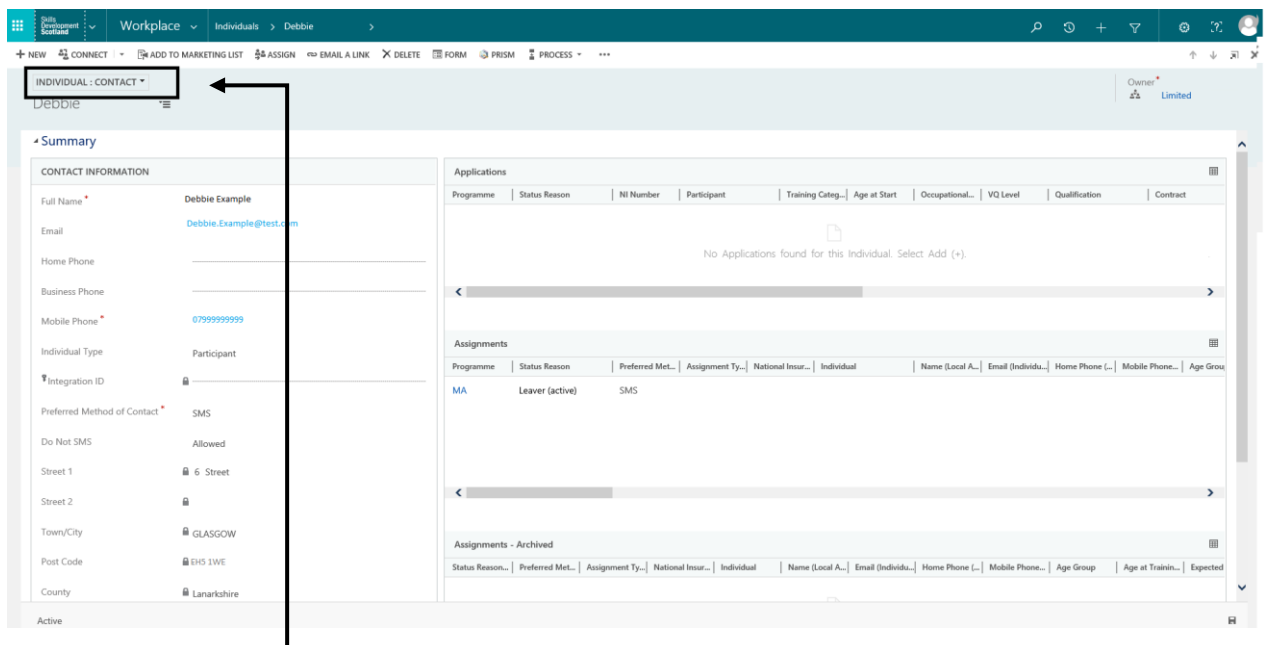


- The Individual Contact screen can also be accessed from the assignment by selecting the blue hyperlink of the individual's name at the top of the record:



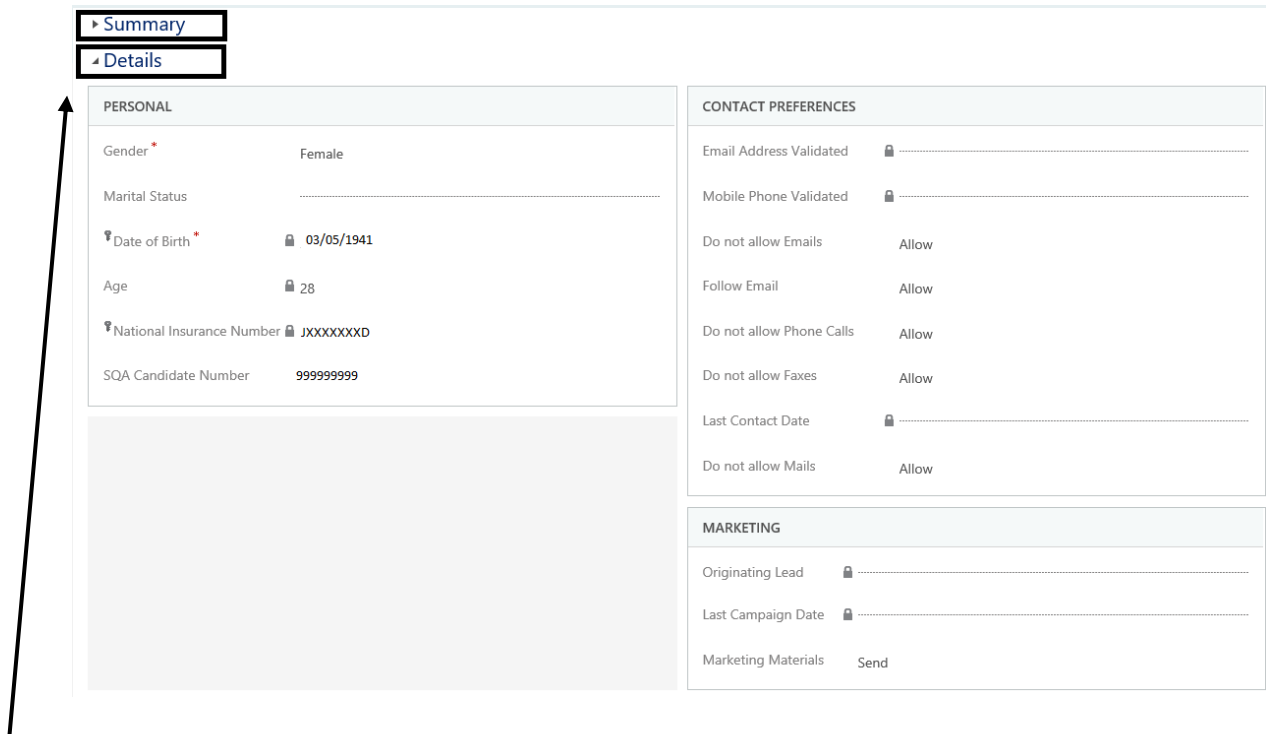
Trainee name is a hyperlink – this link will take you into the Individual Contact screen.

- Within the Individual Contact screen, changes to the information can be made by clicking into the relevant field.



To make changes to the personal information, ensure the view is set to Individual: Contact. It may default to one of the other read only views.

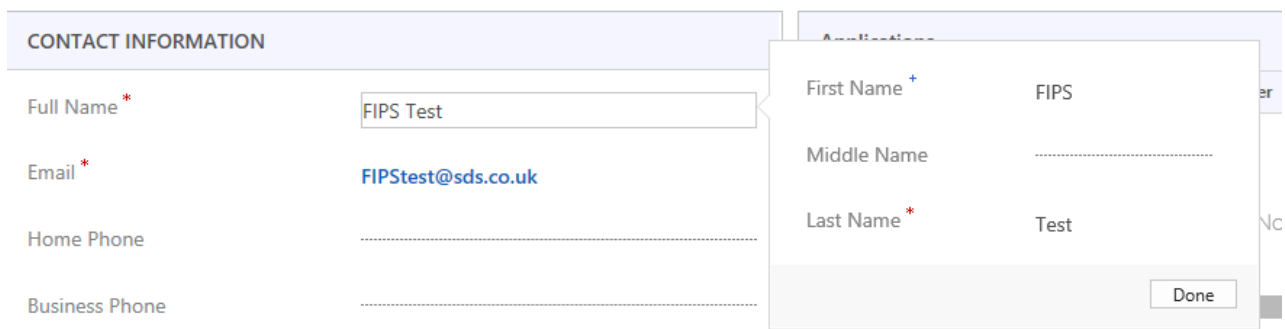
- Fields marked with a red asterisk (*) are mandatory fields. The page cannot be saved until these fields are complete. Any fields displaying the padlock symbol are automatically populated by FIPS and cannot be changed within this screen. Information that can be changed are located under the headers “Summary” and “Details”:



The screenshot shows a user profile form with two tabs: 'Summary' and 'Details'. The 'Details' tab is selected and highlighted with a box. Below the tabs, there are two main sections: 'PERSONAL' and 'CONTACT PREFERENCES'. The 'PERSONAL' section contains fields for Gender (Female), Marital Status, Date of Birth (03/05/1941), Age (28), National Insurance Number (JXXXXXXD), and SQA Candidate Number (99999999). The 'CONTACT PREFERENCES' section contains fields for Email Address Validated, Mobile Phone Validated, Do not allow Emails, Follow Email, Do not allow Phone Calls, Do not allow Faxes, Last Contact Date, and Do not allow Mails. Below these sections is a 'MARKETING' section with fields for Originating Lead, Last Campaign Date, and Marketing Materials (Send). A box highlights the 'Summary' and 'Details' tabs, and an arrow points to the 'Details' tab.

Collapsible headers are highlighted above. Trainee personal information sits within both areas and these can be used to access the required fields.

- The fields are plain text until you click into them to make a change. As an example, “Full Name” field has been clicked into and an edit box appears allowing you to update the first, middle and last name details:



The screenshot shows the 'CONTACT INFORMATION' form. The 'Full Name' field is highlighted with a box, and an edit box is open over it. The edit box contains three fields: 'First Name' (FIPS), 'Middle Name' (empty), and 'Last Name' (Test). A 'Done' button is visible at the bottom right of the edit box. The 'CONTACT INFORMATION' form also includes fields for Email (FIPStest@sds.co.uk), Home Phone, and Business Phone.

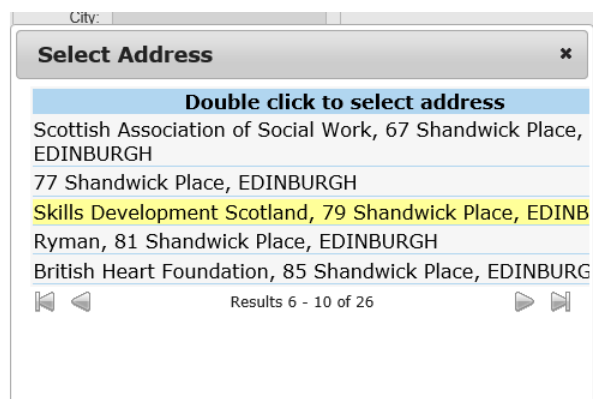
- The Preferred Method of Contact (PMOC) is a mandatory field and can be changed only within this screen. Click on the field and select either SMS or Email from the dropdown menu. Updates will ensure that any future communications coming from FIPS will be sent to the new preferred method of contact from the point of update.

8. The trainee address fields show as locked as this information is pulled from a database lookup function (these are not free text fields). To update, select the “Address Search / Update” button:

Street 1	🔒 13 Melrose Avenue
Street 2	🔒 Foxbar
Town/City	🔒 PAISLEY
Post Code	🔒 PA2 9JA
County	🔒

Address Search / Update

9. The postcode lookup field will appear allowing you to select the address from the options displayed. This contains business names etc however will only pull in the address details, not the company name. If the address you require is not listed, select a nearby address and submit a Help Form to the FIPS Support Team for it to be manually updated:



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. It’s in these instances that the FIPS Support Team need to manually edit the address details for an individual at the request of a Training Provider.

10. The updated address details will appear in the search fields. Click on the “Update Address” button to save the changes. The new address details will now appear in the assignment.

11. SQA Candidate Number if not entered at the application stage must be added within this screen. It cannot be added / edited in the assignment. The Date of Birth and National Insurance Number fields display the key symbol and cannot be changed within this screen. These fields can be updated by the Training Provider using Change of Circumstance entity on FIPS.

Applications / Assignments

Under the Individual Contact view there is a list of Applications / Assignments / Archived Assignments. Training providers will only be able to view records owned and created by their organisation.

12. Any draft applications which haven’t been submitted will be displayed within the applications section. Assignments with the following statuses will show in the assignment section within this screen – 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.

Applications									
Programme	Status Reason	NI Number	Participant	Training Categ...	Age at Start	Occupational...	VQ Level	Qualification	Contract
MA	Draft	JZ999999Q	Example Only	25+		Construction...	SCQF 7	23-Constructio...	Limited -

Assignments										
Programme	Status Reason	Preferred Met...	Assignment Ty...	National Insur...	Individual	Name (Local A...	Email (Individu...	Home Phone (...	Mobile Phone...	Age Group
MA	Unconfirmed Assign...	SMS	New Start	JZ999999Q	Example Only	North Ayrshire	Example@test.com			25+

Assignments - Archived											
Status Reason...	Preferred Met...	Assignment Ty...	National Insur...	Individual	Name (Local A...	Email (Individu...	Home Phone (...	Mobile Phone...	Age Group	Age at Trainin...	Expected
Leaver (archi...	SMS		JZ999999Q	Example Only	North Ayrshire				16-19	17	04/05
Rejected	SMS		JZ999999Q	Example Only	North Ayrshire				16-19	20	24/05

Shown above is an example of an Individual that has a draft application, an active assignment and 2 archived records. Double clicking on the white area of the row will take you into that specific record to view the details. Any link in FIPS that is blue is a hyperlink and will take you to a specific screen or reference table. If you are unable to make updates to any of the candidate data described in this guide, contact the FIPS Support Team for assistance.