FIPS QUICK START GUIDE

Updating Participant Personal Details

Individual Contact entity (Individuals) should be used to update and manage participant personal data in FIPS. Any changes made in this area automatically updates the related assignment. Participant name, email address, home phone and mobile number, home address, SQA candidate number (SCN) and preferred method of contact should all be amended within the Individual Contact. This information cannot be updated from an Assignment.

There is a video that provides more information on this. Click the play button to view this.

1. An individual can be found on FIPS by clicking into the Individuals entity on the workplace menu:
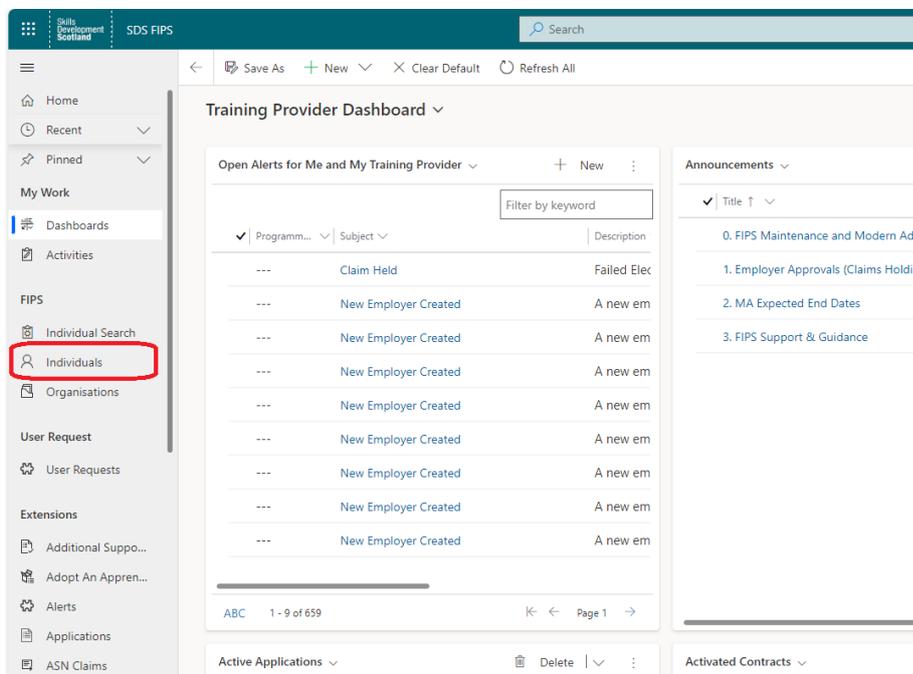
2. The individuals entity contains individual participant records and employer contact records. Search the name or NI number in the search box at the top right-hand side of the screen. If using a participant name, FIPS will only return the results that match the exact name entered, therefore it is best practice to include the wildcard function (asterisk *) to return the best results:
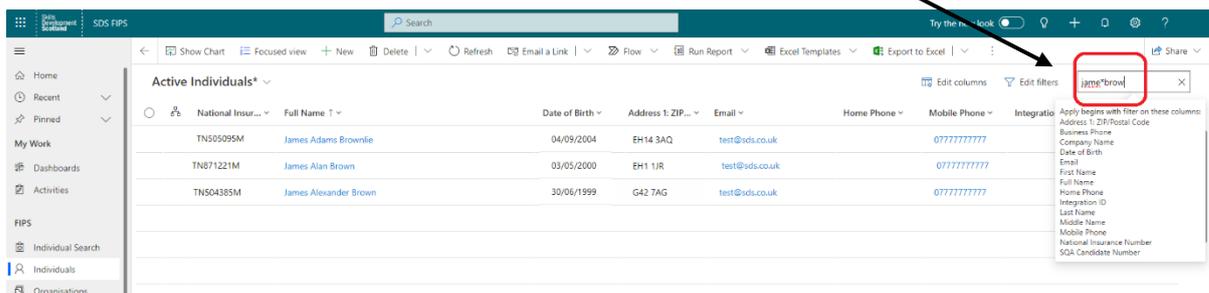
- To open the Individual Contact record, double click on the row or click on the full name hyperlink. The individual contact screen will open.

3. **The Individual Contact screen can also be accessed from within an assignment by selecting the blue hyperlink of the individual's name at the top of the record and within the Participants Details tab:**
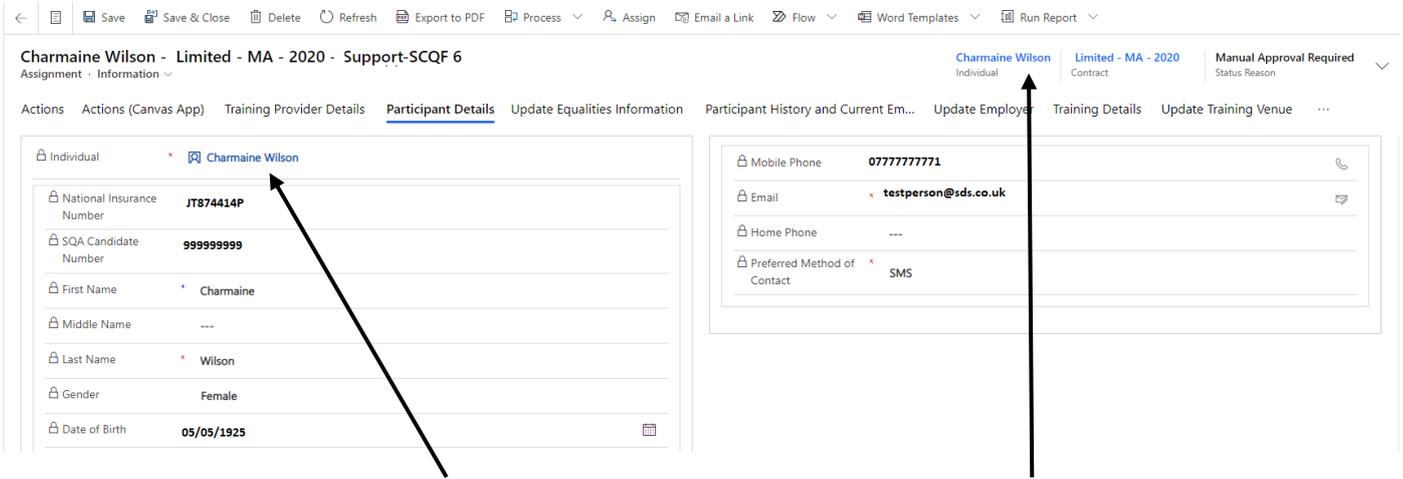
Participant name is a hyperlink – this link will open the Individual Contact screen.

4. **When the Individual Contact screen opens, ensure the form view is set to "Individual: Contact":**
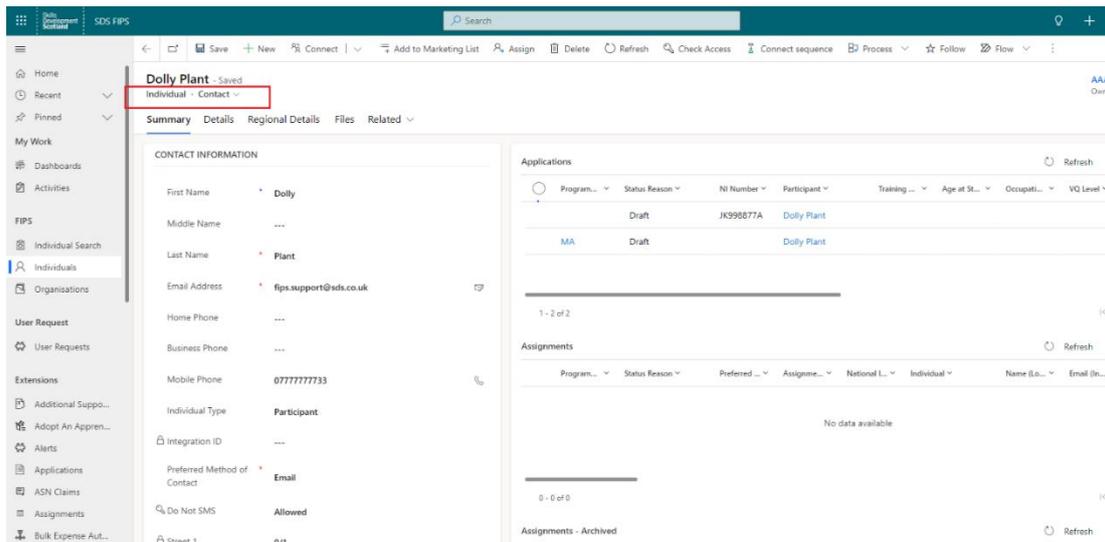
If this is set to any other form, use the drop-down to set this to "Contact":
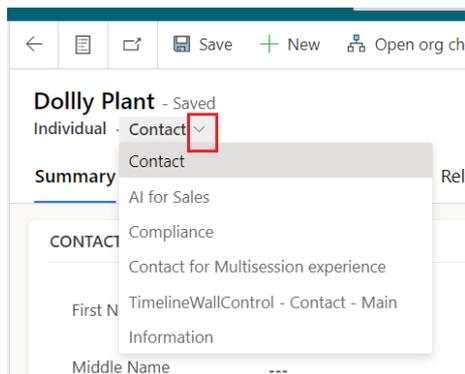
5. **Name details, email address, contact numbers, preferred method of contact and home address can all be changed within the Summary tab. Gender and Scottish Candidate Number (SCN) can be amended within the Details tab:**

6. **If not entered at the application stage, SCN 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 padlock symbol and cannot be changed within this screen. These fields can be updated by the Training Provider using Change of Circumstance entity on FIPS.**

7. **Within the individual contact record, 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.**

8. **The Preferred Method of Contact (PMOC) is a mandatory field and can be changed only within the Individual Contact. Click on the field and select either SMS or Email from the dropdown menu. Any changes will ensure that any future communications coming from FIPS will be sent via the new Preferred Method of Contact from the point of update. When a change is made to the email address, an automated email address validation message is sent to the new email address. The user must then confirm that their email address is accurate.**

- To make any changes to participant details, click into the relevant field to edit the details. Once changes have been made, click on Save on the top ribbon menu.

9. To amend the participant home address, click into the Summary tab and scroll down to the "Address Search / Update" button. This will display address search fields. Use Address Line 1 to search for the new address:

- **Address Line 1 can be used to search for street name, house name, house number, postcode, post town etc or a combination of these. In the example above, "haymarket terr" has been entered into Address Line 1. Relevant results will be displayed and can be drilled down to reveal more results by using the arrow. Select the address required. The other address fields will be populated automatically once selected. Click on Update Address to update the record with the new details:**

- This will display the new address details within the Summary tab of the Individual Contact and update any related assignments that the participant has on FIPS to show the current information.

> 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. Requests can be raised via the User Requests entity on the workplace menu.

Applications / Assignments

> Under the Individual Contact view there is a table that shows Applications / Assignments / Archived Assignments for a participant. Providers will only be able to view records owned and created by their organisation.

1. **Any draft applications which have not 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:**

> Shown above is an example of a participant individual record that has a draft application, no active assignments and a rejected and leaver archived assingment. 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 participant data described in this guide, contact the FIPS Support team using the User Requests entity for support.