

FIPS QUICK START GUIDE

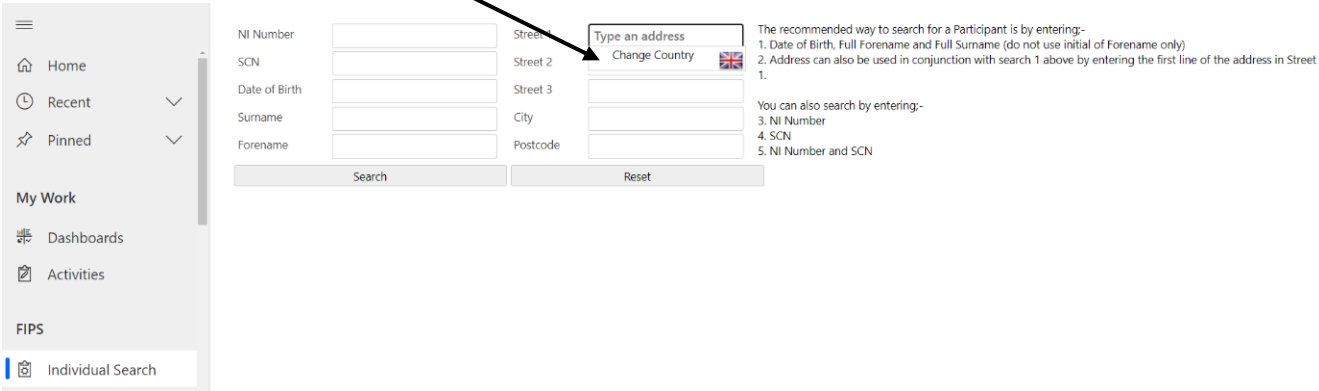
Searching for Address Details in FIPS

Address details in FIPS can be searched for / added in multiple areas. Individual Search, Application, the Individual (contact) screens all contain the address search lookup. This guide will cover how to perform an address search in each area using a different method to maximise results returned.



There is a video that covers this process – click the play button to view this.

1. The address search for individuals / participants can be found in the Individual Search, Application and Individual (contact) entities in FIPS. Participant addresses cannot be searched for or updated within an Assignment record. To update the details for an assignment, the address search within the Individual (contact) record must be used.
2. The address search contains an active lookup within Street / Address Line 1 that will display a list of interactive options based on your search. All other address fields including postcode are locked and information cannot be manually entered into these fields.
3. Address Line 1 is where the address search must be performed. When Address Line 1 is clicked into, an option to select “Change Country” will appear. This should be left as the default setting:



- the screenshot above is in the Individual Search entity in FIPS.
4. Postcode, town, house number / street name or a combination of the address details can be used in the search. As information is input, relevant results will be generated on screen. Individual Search, Application, Individual Contact address searches will be demonstrated in the screenshots below. Each entity will have different address details input to demonstrate different combinations for searching.

Individual Search – example of searching using postcode only

The recommended way to search for a Participant is by entering:-
 1. Date of Birth, Full Forename and Full Surname (do not use initial of Forename)
 2. Address can also be used in conjunction with search 1 above by entering the full address or Street 1.

You can also search by entering:-
 3. NI Number
 4. SCN
 5. NI Number and SCN

Street 1	Street 2	Street 3	City	Postcode	Items
eh125h	Devon Gardens, EDINBURGH, EH12				11 items
	Haymarket Terrace, EDINBURGH, EH12				45 items
	Osborne Terrace, EDINBURGH, EH12				23 items
	Stanhope Place, EDINBURGH, EH12				18 items
	Devon Place, EDINBURGH, EH12				31 items
	Sutherland Street, EDINBURGH, EH12				48 items
	West Stanhope Place, EDINBURGH, EH12				9 items
	Borthwick Place, EDINBURGH, EH12				7 items

- In Street Line 1, part of the postcode (“EH12 5H”) has been input. The results returned contain any addresses with that information within the address. The scroll bar and drill down arrows can be used to locate the specific address required.
- When an address has been selected, the address details will populate within the locked fields e.g., Street 2 / City / Postcode:

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NI Number	SCN	Date of Birth	Surname	Forename	Street 1	Street 2	Street 3	City	Postcode
		05/05/2001	Record	Test	3 Devon Gardens			EDINBURGH	EH12 5HA

- If the incorrect address has been selected in error, click back into Street Line 1 and perform the search again and select the relevant address to update the fields.

Application - example of searching using street name

- Participant address details can be added in an Application if the address was not included in the Individual Search or updated if the address details displayed are now old details during the application submission. In the Participant Details tab within an application, click on the Address Search / Update button:

TR

Test Record - Unknown Contract

Application · Information ▾

Training Provider Details
Training Details
Employer Details
Participant Details
Participant History and Cu

Middle Name	---	Telephone Number (Home) Available
Last Name	+ Record	Preferred Method of Contact
Gender	+ ---	🔒 Post Code
Date of Birth	+ 05/05/2001 📅	🔒 Street 1
Temporary NI Number Required	<input checked="" type="checkbox"/> No	🔒 Street 2
NI Number	+ ---	🔒 Town/City
SCN	---	🔒 County

Address Search / Update

- This button will reveal the address search fields. All fields except Address Line 1 will be locked. Using Address Line 1, enter part of the address to begin the search. In this example, part of the street name has been entered:

Hide Address Search / Update

Shandwick Place, EDINBURGH, EH2 195 items ▶

Shandwick Place, Inverkip, GREENOCK, PA16 6 items ▶

Shandwick Place Hostel, 24 Shandwick Place, EDINBURGH, EH2

Shandwick Place Specsavers Limited, Forum 6, The Forum, Parkway, Whiteley, FAREHAM, Hampshire, PO15

Shandwick Place Visionplus Limited, Forum 6, The Forum, Parkway, Whiteley, FAREHAM, Hampshire, PO15

- The results returned are all UK addresses than contain “Shandwick Plac”, as per the search input. Review the list and select the relevant details. Once selected, the locked fields will be populated with the address. Click on the Update Address button to attach the address to the application:

3 Shandwick Place
Inverkip
GREENOCK
Renfrewshire
PA16 0GD

- If the results disappear from the list when searching, click on backspace within address line 1 to refresh the list of results then select the address required to populate the locked address fields.

Individual Contact – example of updating a participant address when there is an active assignment

6. If a participant has an active assignment e.g., Confirmed/ Unconfirmed assignment, Manual Approval Required, Leaver Active etc. home address details must be updated in the Individual Contact record. Individual Contact records are listed within the Individuals entity on FIPS:

The screenshot shows the FIPS system interface. On the left is a navigation menu with 'Individuals' highlighted in red. The main content area shows the 'Individual Contact' record for 'Roz Roolz'. Under the 'Summary' tab, various fields are listed, including 'Home Phone', 'Business Phone', 'Mobile Phone', 'Individual Type' (Participant), 'Integration ID', 'Preferred Method of Contact' (Email), 'Do Not SMS' (Allowed), 'Street 1' (Wolfson Hall), 'Street 2' (West Of Scotland Science Park Kelvin Campus, 2317 Maryhill Ro...), 'Town/City' (GLASGOW), 'Post Code' (G20 0TH), and 'County'. The 'Address Search / Update' button at the bottom is highlighted in red.

- Ensure the form view is set to “Individual: Contact”. Under the Summary tab, scroll down to access the Address Search / Update button. Use Address Line 1 only to input part of the address required.

- In this example, house number and street name has been entered:

Summary Details Regional Details Files Related

Hide Address Search / Update

102 glasgow road

11 results

- 102 Glasgow Road, Baillieston, GLASGOW, G69
- 102 Glasgow Road, BATHGATE, West Lothian, EH48
- 102 Glasgow Road, Cambuslang, GLASGOW, G72
- 102 Glasgow Road, Camelon, FALKIRK, FK1
- 102 Glasgow Road, DENNY, Stirlingshire, FK6
- 102 Glasgow Road, EDINBURGH, EH12
- 102 Glasgow Road, PERTH, PH2
- 102 Glasgow Road, SOUTHSEA, Hampshire, PO4

- Results returned contain the search criteria entered. Select the relevant address to complete the locked fields. The search can be refined further by inputting more information, for example, inputting part of the town name:

102 glasgow road edinb

102 Glasgow Road, EDINBURGH, EH12

County

Update Address

- In this example, "102 glasgow road edinb" has been entered into Address Line 1. Only 1 result is returned: the Edinburgh address.
- Select the result then click on "Update Address" to attach the address details to the participant:

102 Glasgow Road

Line 2

EDINBURGH

County

EH12 8LP

Update Address

- The new address will now show on the related assignments under the Participant Details tab.