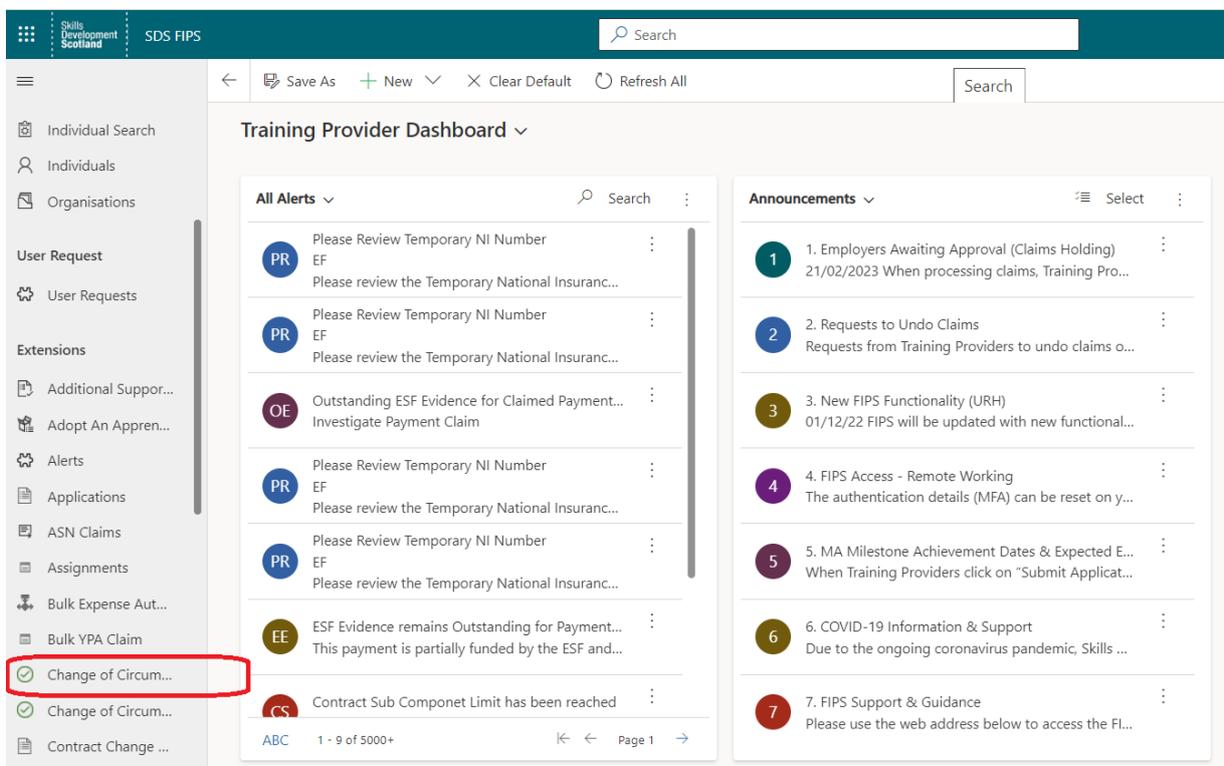


FIPS QUICK START GUIDE

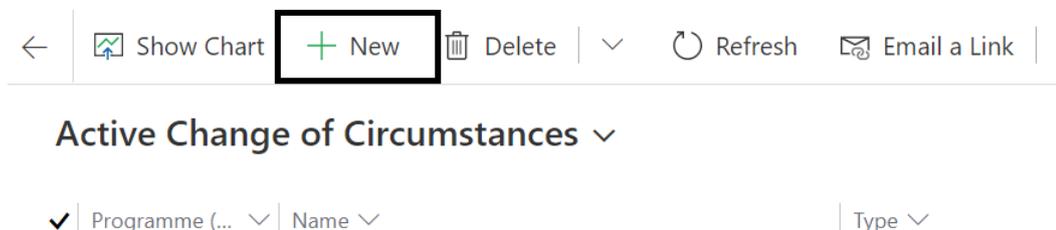
Change of Circumstance – Qualification Changes for Engineering Frameworks

The Change of Circumstance (COC) entity on FIPS enables Training Providers to make changes to specific participant information. The following data can be amended via the Change of Circumstance entity: Start Date, Date of Birth, National Insurance Number and Qualification. This guide will provide details on how to update Qualification details for an individual’s assignment that is undertaking an Engineering qualification. For all other qualifications, Training Providers should contact their contract executive at SDS to discuss this.

1. A change to the Qualification details can only be processed when there is active assignment record for a participant. It cannot be changed when at Draft Assignment status. To update an individual’s Qualification on FIPS, select the Change of Circumstance extension from the Workplace menu:



2. Within the COC screen, click on “+ New” which will open the Change of Circumstances form:



3. **Type and Individual are mandatory fields – mandatory fields are depicted with a red asterisk (*). Click into the “Type” field, and select “Qualification” from the list displayed:**

New Change of Circumstances

General

Type *	--Select--
Individual *	--Select--
	Date of Birth
	NI Number
	Qualification
	Start Date
	Bulk Transfer

4. **Once this has been selected, additional fields will appear on the right-hand side of the page:**

General

Type *	Qualification
Assignment *	---

Change of Qualification	
New Qualification *	---

5. **Click into the Assignment field and search for the participant assignment. Search using the wildcard function – asterisk (*). The Recent Records / All Records button can also be used:**

General

Type *	Qualification
Assignment *	Look for Assignment

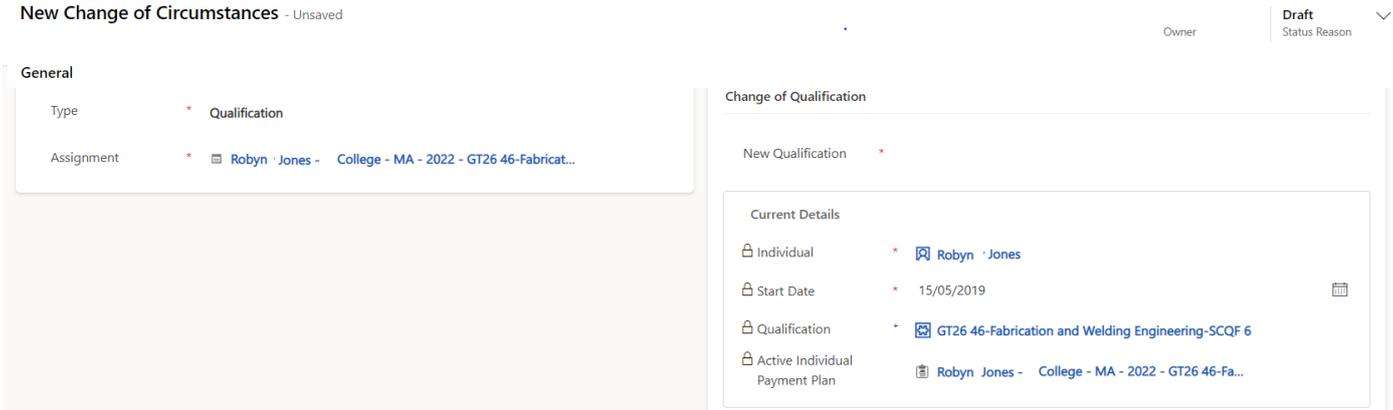
Assignments

Recent records

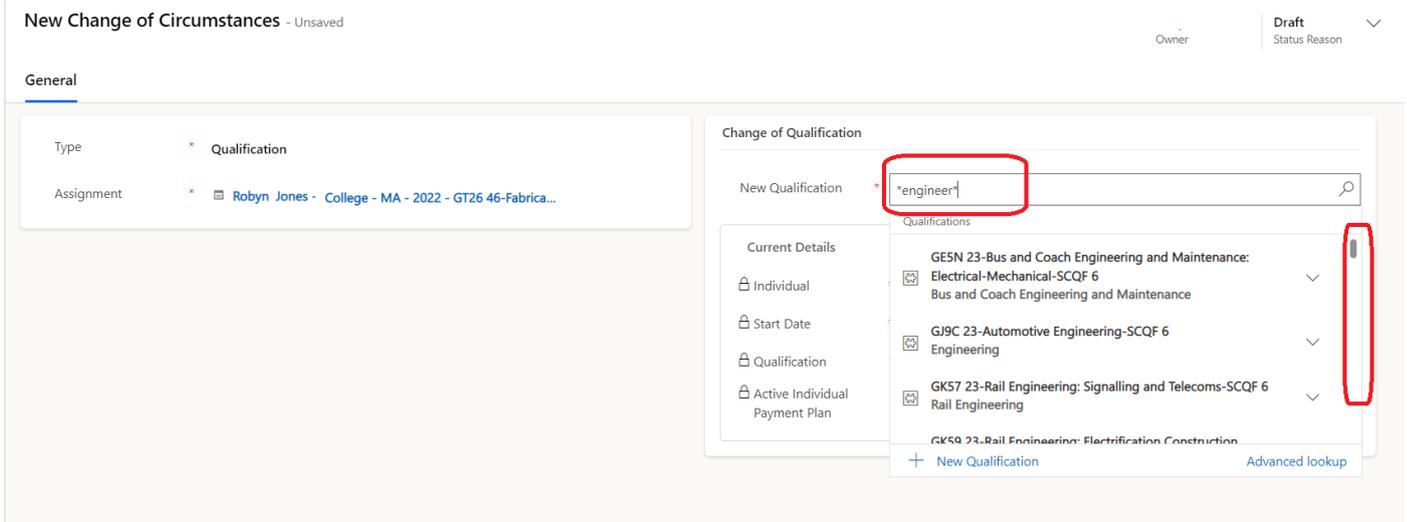
- Bobby Test - Sept2020 Training Limited
- MA - 2020 - GN9C 45-Vehicle Body
Repair-SCQF 5
Sept2020 Training Limited
- Slippy Steps - Sept2020 Small Training
Co - EF - 2020
Sept2020 Small Training Co
- Cable Tie - Sept2020 Small Training Co
- EF - 2020

Change of Qualification	
New Qualification *	---

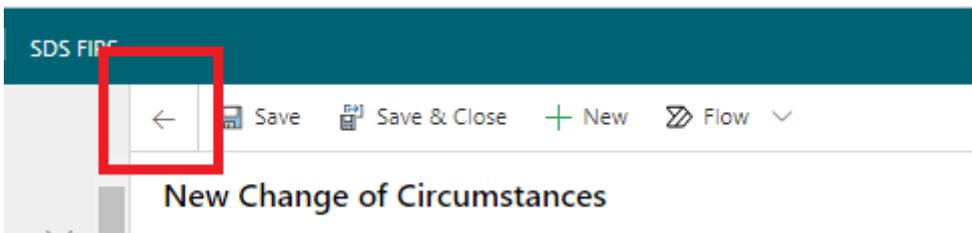
6. When the participant’s assignment has been selected, the current details will appear on the right-hand side of the screen:



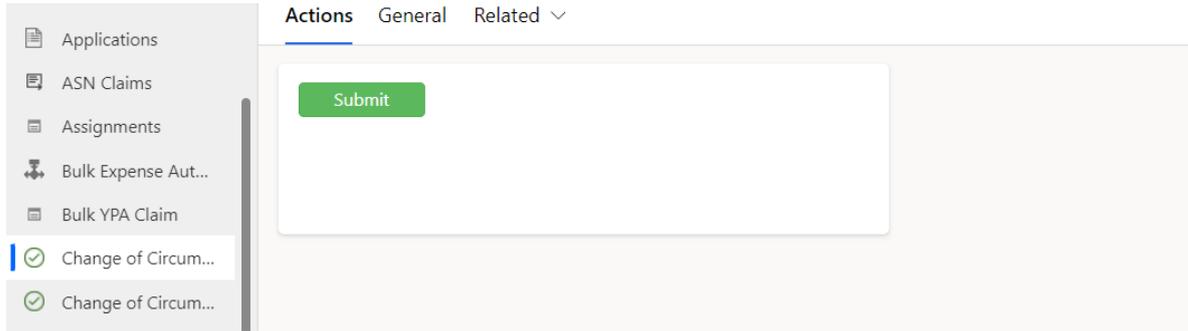
7. To update the Qualification, click into the “New Qualification” field and search for the new qualification details. The wildcard function can be used to search. Search for either part or the full name of the qualification or part of the qualification code:



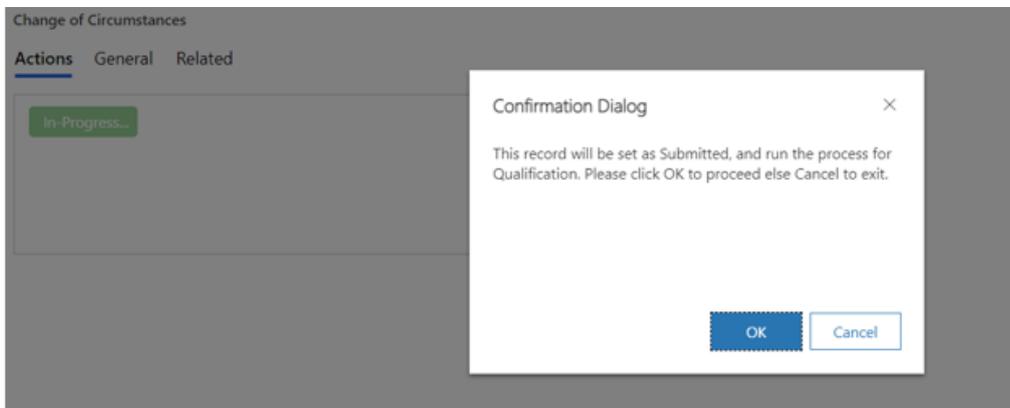
- In this example, “engineer” has been entered into the field and the results returned contain this search word
- Once selected, save the COC record use the Save button
- When a New Qualification has been selected use the back arrow to return to the draft COC record. Click this twice:



8. Once saved, a Submit button will be displayed under the Actions tab. Click this to submit the change of qualification:

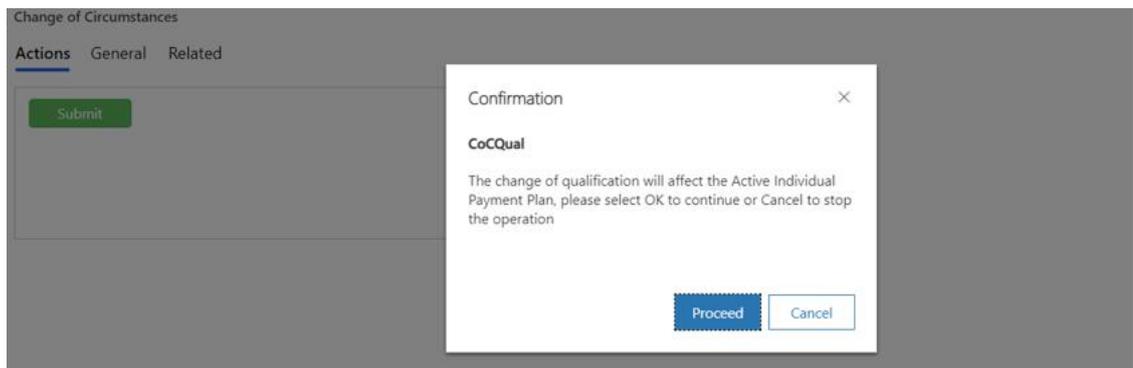


9. Click OK on the confirmation box to complete the process:



- If the change is no longer required, click on Cancel. The COC will remain in Draft status and the change will not be processed

10. A change to the qualification will create a new Individual Payment Plan for the related assignment. The following message will appear. Click on Proceed to continue:



- The screen will refresh, and the status reason of the COC record will now show as "Individual Payment Plan Review". **Do not click on Submit for Approval at this stage. Click into the General Tab.**

11. When the COC is at Individual Payment Plan Review status, FIPS is performing checks against the contracted volumes for the Training Provider contract. It is only when these checks are complete that the Individual Payment Plan for the new qualification is displayed in the Individual Payment Plan Review grid within the General Tab:

Qualification - Roz DEMO ONLY - MA - 2018 - GL2M 23-Engineering Maintenance-SCQF 6
 Change of Circumstances

Owner: Individual Payment Plan Review
 Status Reason

Actions: General Related

Individual Payment Plan Review

Payment Claims COC Grid View

Status Reason	Holding Re...	Individual	Participant ...	Program...	Area of Sco...	Occupation...	Framework...	VQ Level (...)	Start D
Pending	---	Roz Rootz	MA	Lowlands & U...	---	---	---	---	18/01
Pending	---	Roz Rootz	MA	Lowlands & U...	---	---	---	---	18/01
Pending	---	Roz Rootz	MA	Lowlands & U...	---	---	---	---	18/01
Pending	---	Roz Rootz	MA	Lowlands & U...	---	---	---	---	18/01
Pending	---	Roz Rootz	MA	Lowlands & U...	---	---	---	---	18/01

Existing Active IPP: Roz DEMO ONLY - MA - 2018 - GL2M 23-Engineering Maintenance-SCQF 6

Change of Qualification

New Qualification: GAD0 22-Sport and Active Leisure: Operational Services-SCQF 5

Current Details

Individual: Roz Rootz

Start Date: 18/01/2021

Qualification: GL2M 23-Engineering Maintenance-SCQF 6

Active Individual Payment Plan: Roz DEMO ONLY - MA - 2018 - GL2M 23-Engineering Maintenance-SCQF 6

Existing Individual Payment Plan

Name: Roz DEMO ONLY - MA - 2018 - GL2M 23-Engineering Maintenance-SCQF 6

No of Units: 16
Last updated: Not Available

Total Paid: £500.00
Last updated: Not Available

Total Value: £8,000.00
Last updated: Not Available

Do not click “Submit for Approval” until the Individual Payment Plan Review grid (as above) is populated with the new IPP. (This is highlighted above). **If this is blank, do not submit until the information is populated.** The time it takes for this data to be displayed will vary due to several factors, therefore, Training Providers should wait at least one hour to allow this part to populate the new IPP information.

If the Change of Circumstance is submitted without the new Individual Payment Plan appearing within the grid, it will be rejected by Skills Development Scotland and the COC will need to be entered by the Training Provider again.

- In some instances, the assignment start date may be prior to the start date of the qualification in FIPS. Because of this, the IPP grid will not populate with the relevant IPP details. In this scenario, Training Providers can submit the qualification COC with the IPP review grid blank. This will be populated by SDS when the COC is approved.

Mark as Achieved – Claims

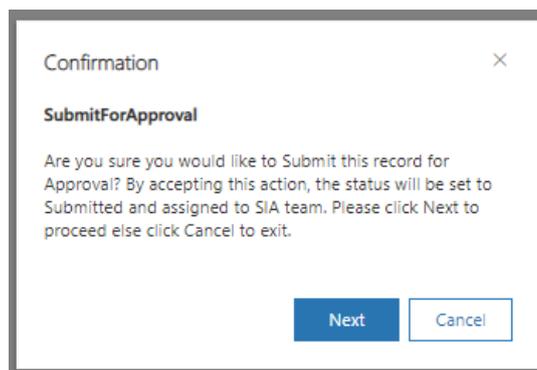
Milestones that have already been claimed on the assignment IPP can be set to ‘achieved’ during the COC process **if required**. Doing this will mean that FIPS will automatically set these claims to Confirmed on the new IPP once the COC process has been completed. These claims therefore do not need to be manually claimed by the Training Provider when the assignment is updated to show the new qualification.

To mark milestones as achieved, the status of the COC record must be at “Individual Payment Plan Review”:

Within the table “Individual Payment Plan Review” the new IPP will be displayed. Claims will show as Pending. To view the milestone numbers, use the scroll bar to navigate the information:

Expected ...	Actual En...	Age Grou...	Claim Type	Milestone Number	Amount
23/10/20...		16-19	Start Pay...	0	£3,570.00
23/10/20...		16-19	Milestone	1	£100.00
23/10/20...		16-19	Milestone	2	£100.00
23/10/20...		16-19	Milestone	3	£100.00
23/10/20...		16-19	Milestone	4	£100.00

12. Once the IPP table contains the new IPP details, the COC can be submitted for approval. Under the Actions tab, click on Submit for Approval. A confirmation box will be displayed advising that the request will be submitted to SDS for approval. Click Next to proceed:



- The screen will refresh, and the COC will now show the status reason “Submitted”.

13. The submitted Qualification Change of Circumstance will be reviewed by Skills Development Scotland in due course. This may take up to 5 days. Once approved / rejected, an alert will be generated on the Training Provider dashboard / alerts entity, providing details of the change. If approved the participant assignment will be updated and the new qualification and Individual Payment Plan details will be displayed.

- Once approved or rejected, the completed COC record will be displayed within the Inactive Change of Circumstances system view.