

## **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:

*	Select
*	Select
	Date of Birth
	NI Number
	Qualification
	Start Date
	*

New Change of Circumstances

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

General		
Туре	* Qualification	Change of Qualification
Assignment	*	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:

Туре	*	Qualification		C	hange of Qualification
Assignment	*	Look for Assignment	Q		New Qualification *
		Assignments	Recent rec	ords	
		Bobby Test - Sept2020 Training - MA - 2020 - GN9C 45-Vehicle Repair-SCQF 5 Sept2020 Training Limited	Limited Body	-	
		Slippy Steps - Sept2020 Small Tr Co - EF - 2020 Sept2020 Small Training Co	aining	/	
		Cable Tie - Sept2020 Small Train	ing Co	<i>,</i> .	



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

New Change of Circumstances - Unsaved	• Owner Status Reason
General	Change of Qualification
Type * Qualification	
Assignment • B Robyn · Jones - College - MA - 2022 - GT26 46-Fabricat	New Qualification *
	Current Details
	A Individual * 🕅 Robyn 'Jones
	A Start Date ★ 15/05/2019 🛗
	A Qualification * 🔀 GT26 46-Fabrication and Welding Engineering-SCQF 6
	Active Individual Payment Plan I Robyn Jones - College - MA - 2022 - GT26 46-Fa

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:

New Change of Circumstances - Unsaved	Ovner Status Reason
General	
Type " Qualification	Change of Qualification
Assignment * 🖬 Robyn Jones - College - MA - 2022 - GT26 46-Fabrica	New Qualification
	Current Details     GESN 23-Bus and Coach Engineering and Maintenance:       △ Individual     ☑ Electrical-Mechanical-SCQF 6       Bus and Coach Engineering and Maintenance
	A Start Date     GJ9C 23-Automotive Engineering-SCQF 6       A Qualification     Engineering
	Active Individual Payment Plan GK57 23-Rail Engineering: Signalling and Telecoms-SCQF 6 V
	GK59 23-Rail Engineering: Electrification Construction
	+ New Qualification Advanced lookup

- 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:

	Applications	Actions General Related ~
E,	ASN Claims	Submit
	Assignments	
.Ŧ.	Bulk Expense Aut	
	Bulk YPA Claim	
$\oslash$	Change of Circum	
$\oslash$	Change of Circum	

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

n-Progress	Confirmation Dialog ×
	This record will be set as Submitted, and run the process for Qualification. Please click OK to proceed else Cancel to exit.

- 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:

Change of Circumstances Actions General Related Submit	Confirmation CoCQual The change of gualification will affect the Active	× e Individual
	Payment Plan, please select OK to continue or C the operation Proceed	Cancel to stop

- 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:

ualification - Roz ange of Circumstances tions <u>General</u> Rela	DEMO ONLY	- MA - 2018 - C	5L2M 23-Engine	ering Maintenance-S	CQF 6			Individual Payment Plan Revie Owner Status Reason
A Type A Assignment	Qualification Roz DEM	D ONLY - MA - 2018 - 1	GL2M 23-Engineering N	Maintenance-SCQF 6				Change of Qualification  A New Qualification  Current Details  Current Details  Current Details
Individual Payment Pla	an Review							
Payment Claims COC Grid	d View $ \smallsetminus $				🖒 Refresh	Run Report	× :	A Start Date * 18/01/2021
✓   Status Reason $∨$	Holding Re	V Individual V Part	icipant $\vee$ Programm	$ \lor   $ Area of Sco $ \lor   $ Occupatio	n V   Framework	$ee $ VQ Level (	∨  Start D	A Qualification * 🖾 GL2M 23-Engineering Maintenance-SCQF 6
Pending		Roz Roolz	MA	Lowlands & Up			18/01	Active Individual Payment Plan I Roz DEMO ONLY - MA - 2018 - GL2M 23-Engineering Maintenance-SCQF 6
Pending		Roz Roolz	MA	Lowlands & Up			18/01	1
Pending		Roz Rooiz	МА	Lowlands & Up			18/01	1
Pending		Roz Roolz	MA	Lowlands & Up			18/01	1
Pending		Roz Roolz	ма	Lowlands & Up			18/01	1
4							Þ	
Existing Individual Pa	yment Plan	O ONLY - MA - 2018 -	GL2M 23-Engineering F	Maintenance-SCQF 6				
🛙 No of Units	16							
Last updated:	Not Available							
🔲 Total Paid	£500.00							
Last updated:	Not Available							
	co. 000. 00							
Total Value	£8,000.00							

**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 <u>if required.</u> 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 assingment 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":

Туре	* Qualification					Change of Qualification	n
Assignment	* 🖬 Jaimie 🛛 Gre	egor - Train	ning Limited - MA - :	2021 - GL2M 23-Engineerir	ng Maintenance	A New Qualification	GM1V 46-Mechanical Manufacturing Engineering-SCQF 6
						Current Details	
lividual Pay	avment Plan Review					A Individual	* 🛛 Jaimie Gregor
invitation i tag							
yment Clain	ms COC Grid View 🗸			Č Refresh ₀⁄°	Flow $\checkmark$	🔓 Start Date	* 18/10/2021
yment Clain	ms COC Grid View 🗸 s Reason Y Holding R Y	Individual 🗸	Partici Y Prog	C Refresh ∞/ <sup>∞</sup> gram ~ Area of S ~	Flow ∨ :	☐ Start Date ☐ Qualification	18/10/2021     18/23-Engineering Maintenance-SCQF 6
yment Clain	ms COC Grid View ~ s Reason ~ Holding R ~ iding	Individual ~ Jaimie	Partici ~ Prog PK068 MA	○ Refresh or <sup>a</sup> gram ~   Area of S ~     Lowlands	Flow $\checkmark$ : Occupati	Start Date     Qualification     Active Individual     Payment Plan	<ul> <li>18/10/2021</li> <li>Clam Call Control Control</li></ul>
yment Clain Status Pend Pend	ms COC Grid View ~ s Reason ~ Holding R ~ iding	Individual ~ Jaimie Jaimie	Partici × Prog PK068 MA PK068 MA	Nefresh     or       gram     Area of S       Lowlands       Lowlands	Flow V	Start Date     Qualification     Active Individual     Payment Plan	<ul> <li>18/10/2021</li> <li>Isolar Content of Content of</li></ul>
yment Clain ) Status Pend Pend	ms COC Grid View v s Resson v Holding R v dring dring dring	Individual ~ Jaimie Jaimie Jaimie	Partici V Prog PK068 MA PK068 MA	C     Refresh     or       gram     V     Area of S v       Lowlands     Lowlands       Lowlands	Flow V	Start Date     Qualification     Active Individual     Payment Plan	18/10/2021      18/10/2021      Control of the second
yment Clain Status Pend Pend Pend Pend	ms COC Grid View 、 s Resson × Holding R × iding iding iding iding iding	Individual ~ Jaimie Jaimie Jaimie Jaimie	Partici × Prog PK068 MA PK068 MA PK068 MA PK068 MA	Netresh     w <sup>a</sup> gram     Area of S *       Lowlands     Lowlands       Lowlands     Lowlands       Lowlands     Lowlands	Flow V :	Start Date     Qualification     Active Individual     Payment Plan	18/10/2021      18/10/202      18/10/20      18/10/

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:

Pay	ment Claims COC Grid View $ \smallsetminus $			<ul> <li>Refresh</li> </ul>	₀⁄° Flow ∨
. ~	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:

Confirmation		$\times$
SubmitForApproval		
Are you sure you would Approval? By accepting Submitted and assigned proceed else click Canc	I like to Submit this record this action, the status will I d to SIA team. Please click M el to exit.	for be set to Next to

- 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.