

FIPS QUICK START GUIDE

Email Address Validation

This guide provides information on the email address validation process in FIPS. Email address validation takes place each time an email address is input to FIPS. An automated email is sent to the email address for the participant or employer contact to validate that their email address is accurate. This guide contains an overview of the process, FAQs and how to resolve issues.

Overview

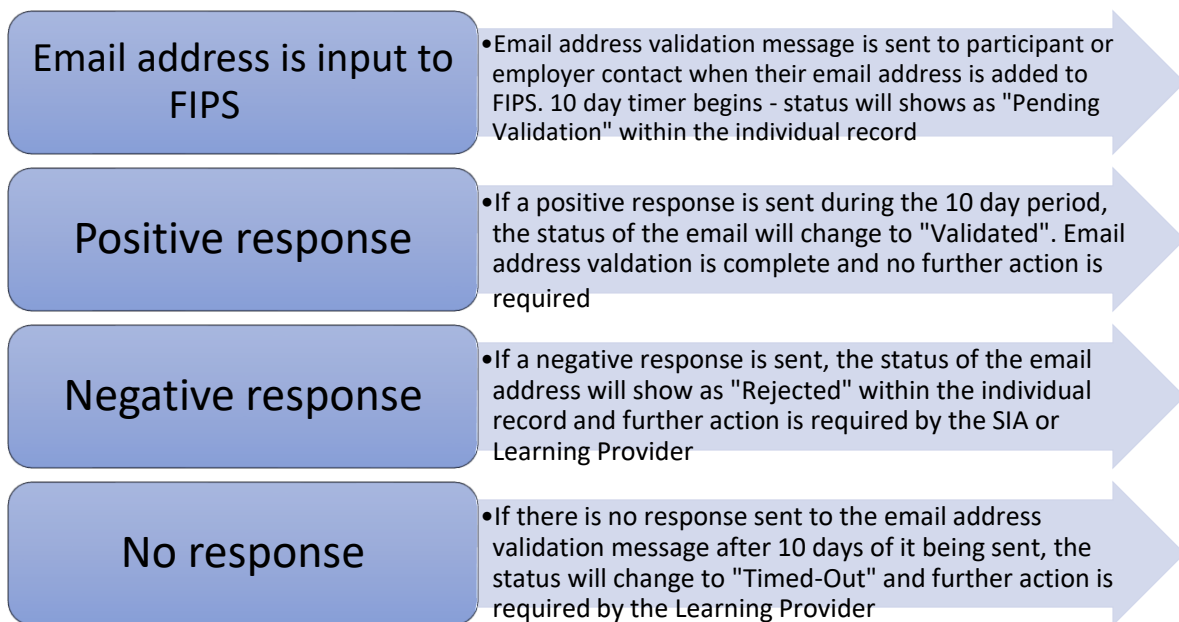
Skills Development Scotland (SDS) relies upon its contracted Learning Providers to maintain high quality and consistent data management. SDS key performance levels require that email addresses for participants and employer contacts are input and remain accurate at all times on FIPS.

If inaccurate email addresses are input to FIPS, messages from FIPS will not be successfully delivered to participants or employers. This may impact other communications, for example the 15-day reminder email that the employer can receive as part of the assignment and claim validation process, as well as other SDS communications e.g., welcome letters or surveys.

The email address validation process is automated and employer contacts and participants must respond to the email address validation message positively to confirm that their email address is accurate which will set it to "Validated" on FIPS.

The process follows a 10-day cycle from when the email address is input on FIPS. The participant and employer contact have 10 days to respond to the email. If no response is received after 10 days, the status will change from "Pending" to "Timed-out".

MA Learning Providers should be aware that email address validation and assignment / new start validation are separate processes which are not linked; participants must respond to both communications and an assignment being "Confirmed" does not impact the email address validation, even if their preferred method of contact is email.



Email Addresses in FIPS

For a participant, when an email address is input or updated during the **application** submission, an automated email is immediately sent to that email address. An email address validation message will also be sent when an email address is changed within the individual contact record while the participant is in training. Changing the email address from the individual record will update the related participant assignment with the new email address. The email address field in an assignment is locked and can only be edited via the individual contact record.

For employer contacts, if a new employer contact record is **created**, an email validation message will be sent out at the point of creation. If the employer contact record is selected from the existing bank of employer contact records in FIPS, the employer contact **will not receive** an email address validation message.

Changes to email addresses must be updated within the individual contact record for the participant or employer contact as these cannot be edited within the participant assignment. There is a video that covers how to view and update the individual record.

Example of Email Address Validation Message

The email address validation message that the participant / employer contact person receives when their email address is added to FIPS is shown below:

Confirmation Of Email Address Required

Dear participant or employer contact name here

Welcome to Skills Development Scotland (SDS). We are the national skills body supporting the people and businesses of Scotland to develop and apply their skills.

You are receiving this email as your email address has been entered into our system in relation to your engagement either as a participant or employer in an Apprenticeship, Individual Training Account or other Training Programme. Your email address may have been entered by your Learning Provider, or by yourself via the My World of Work website and we are asking you to confirm that your email address is correct.

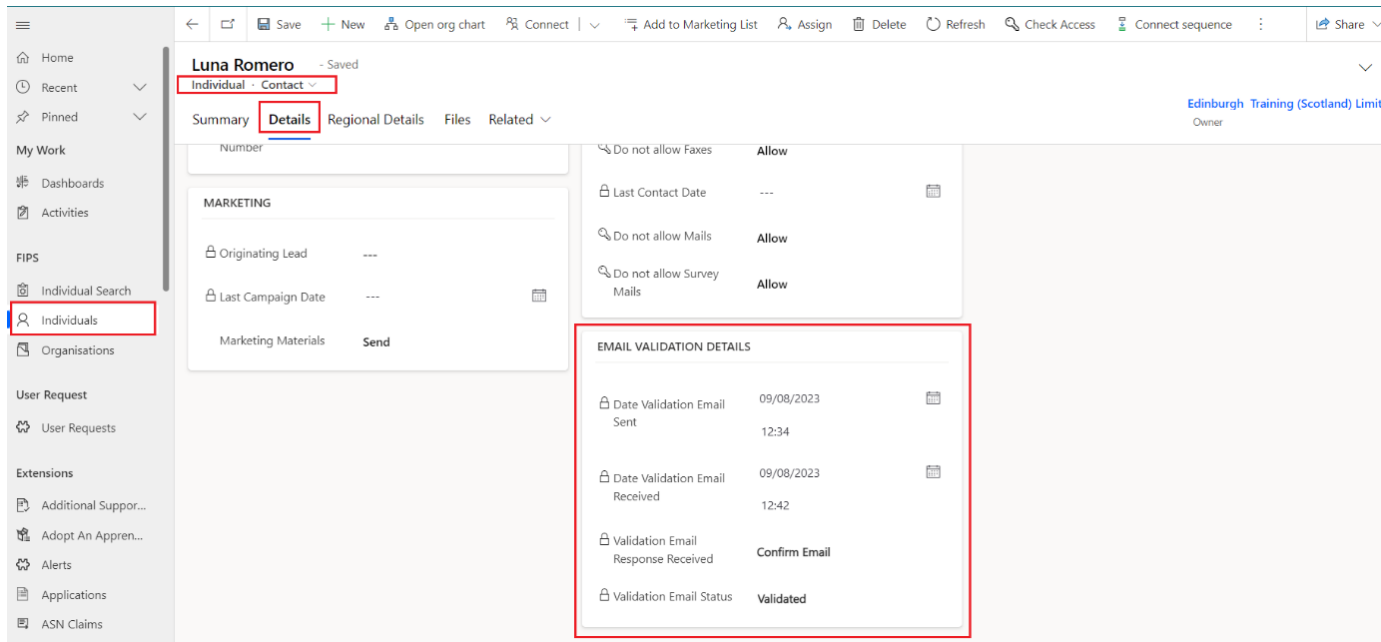
If you have any questions, please contact your Learning Provider or customer.services@sds.co.uk

Confirmation Of Current Email Address Required

- **This email will be sent from the account name “SDS Administrator”.**
- **This is a legitimate email and should be responded to accordingly.**

There are two options within the email that the recipient can click - “Confirm Email” or “Reject Email”. If Confirm Email is clicked, the status of the email address in FIPS will be updated from Pending to Validated. If Reject Email is clicked, the status of the email address will show as Rejected in FIPS.

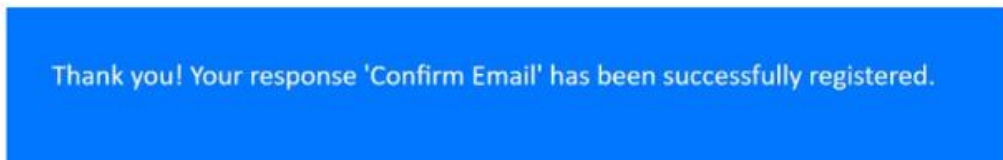
The screenshot below shows an example of the email address validation details table within the individual contact record once successfully validated:



- The Email Validation Details table highlighted above can be found within an individual contact record in FIPS. Within an individual record, ensure the form view is set to “Individual Contact” then click into the Details tab and scroll down to view the table. The “Validation Email Status” field will display the current status; Pending Validation, Validated, Timed-Out or Rejected.

Acknowledgement of Response

When a participant or employer contact person replies to the email address validation message by clicking “Confirm Email”, this message will be displayed on their browser to advise that the response was registered in FIPS:

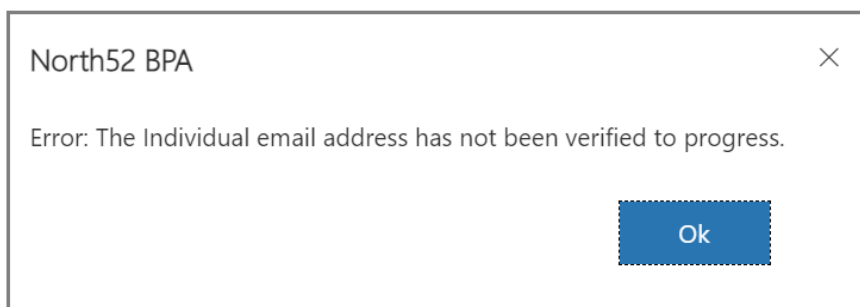


Message sent via Microsoft Power Automate
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- If “Reject Email” is selected, a similar message will be displayed.

Points to Note:

- Participant and employer email addresses must be correct with no typos, up-to-date, and unique to the individual. If the email address is inaccurate, any communications from FIPS will be undeliverable.
- If the employer contact email address is not at Validated status, this will not stop claims from being processed for a participant.
- Only after the participant confirms their email address and the status shows as “Validated” can milestone and outcome claims can be made for the participant.
- If a milestone or outcome claim is submitted when the participant email address is not at Validated status, the following error will be displayed as part of the claim submission:



“Error: The Individual email address has not been verified to progress”.

System Reports and Views

- There are system views in FIPS that Learning Providers can use to manage the email address validation process. Within the **Individuals** entity, the following views are listed within the System Views drop-down:
 - Email Address Validation – Individuals – Awaiting Validation
 - Email Address Validation – Employer Contacts – Awaiting Validation
 - Individuals with Validated Email Addresses
 - Individuals with Rejected Email Addresses

These views can be used to manage the email address validation process. The views are specific to individual type i.e., employer contact or individual participant. These views cannot be filtered on by programme.

Within the **Assignments** entity, the following view is listed within the System Views drop-down:

- Confirmed Assignments – Requiring Validation

This view will show assignments where the participant email address is not at Validated status. It will show all other statuses, e. g. Pending, Rejected and Timed-Out. This can be used to filter on programme e.g., filtered to only show MA assignments where the participant has not yet validated their email address.

Frequently Asked Questions

<p><i>If an email address is Pending Validation, does this mean a start payment will not be paid?</i></p>
<p>Start payments, if applicable, are paid automatically when an assignment is approved. The participant or employer email address status does not impact on start payments. However, milestone and outcome claims can only be submitted when the participant email address is at validated status.</p>
<p><i>If a participant or employer advises that they have a new email address, does this need to be updated in FIPS?</i></p>
<p>If there is a change to the participant or employer email address, Providers must ensure the changes are updated on FIPS and recorded at the next Apprentice Progress Review (see 4.3 of the MA Programme Specifications). A change to the email address in FIPS will generate a new email address validation message to the participant or employer contact at the point of update.</p>
<p><i>Where can the email address be updated from?</i></p>
<p>Email addresses for participants and employers must be amended within the Individual Contact record. Ensure the form view is set to “Individual: Contact” and under the Summary tab of the individual record, the email address field is visible. Once changed, this will display the new email address within the participant assignment.</p>
<p><i>How much time does a participant or employer have to confirm their email address?</i></p>
<p>The email address validation cycle is active for 10 days. The email status will show as Pending Validation until a response is returned. After 10 days, if there is no reply, the status will go to Timed-Out.</p>
<p><i>An individual or an employer has responded to the email address validation by clicking Reject in error – what action needs to be taken?</i></p>
<p>If this happens, Providers should contact their Skills Investment Adviser. SIA’s have the option of resending email address validation messages when inadvertently rejected which will begin the 10-day cycle again. Once resent, they can send a positive reply which will complete the email address validation.</p>
<p><i>The email address input to FIPS was incorrect and the response received is registered as Rejected. How can this be resolved?</i></p>
<p>In these instances, Providers must update the email address in FIPS to the correct address. When the change is made, the email address validation will commence again automatically and the status will change from Rejected to Pending Validation.</p>
<p><i>The participant has replied to the email to confirm their assignment. Why is the email address status still at Pending Validation?</i></p>
<p>Assignment / new start validation and email address validation are two separate processes. These are not linked – an MA participant must reply to the new start / assignment validation message (which can be sent via email or SMS) in order to set an MA assignment to Confirmed and are also required to reply to the email address validation message in order to validate that their email address is accurate.</p>
<p><i>The status shows as Timed-Out. What action needs to be taken?</i></p>
<p>The 10-day limit has been exceeded and no response was received. The participant / employer contact cannot reply to the original email as this has now expired. Providers must manually resend the email address validation message using the Resend Validation toggle button within the individual contact record, under the Details tab. The Resend Validation option will only be visible when the status is Timed-Out.</p>
<p><i>The email address for a participant / employer contact has been changed in FIPS. Does SDS now need to manually resend the email address validation message?</i></p>
<p>When an email address is amended by a Learning Provider, FIPS will automatically send an email address validation message at the point of update. There is no requirement for SDS to manually resend messages.</p>

Issues and Troubleshooting

Issue	How to Resolve
<p>Recipient says they have not received the email</p>	<ul style="list-style-type: none"> ✓ Check email address is correct in FIPS ✓ If correct, advise recipient to check spam/junk folders ✓ Recipient should check their organisation does not filter/block certain incoming emails via a firewall ✓ If the email address validation message cannot be found, it can be resent by the Learning Provider when the validation process times out after 10 days, using the Resend Validation toggle in the Individual Contact record
<p>Email address entered into FIPS is incorrect</p>	<ul style="list-style-type: none"> ✓ This can be updated in the Individual Contact record for the participant or employer contact by the Learning Provider ✓ This will automatically generate a new email address validation message. There is no manual input required by SDS
<p>Recipient has selected the reject option in error</p>	<ul style="list-style-type: none"> ✓ If the recipient clicks on the "Reject Email" button the email status will be set to Rejected ✓ If this is for the participant email address, this will prevent any claims from being processed ✓ If Reject Email has been selected in error, the Provider should contact their SIA. They can resend the message again manually ✓ Once resent, the cycle (10 days) will begin again and the status will now show as Pending Validation

The below message may be displayed when the participant or employer attempt to respond to the email address validation message:

The workflow is not in 'Running' state. It was completed or cancelled.

Message sent via Microsoft Power Automate
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- This message may be displayed if there has already been a response registered to the email address validation message. A participant or employer contact can only reply by clicking one of the buttons within the email once. This will also be returned if they attempt to reply when the status is at "Timed-Out". Providers should check FIPS to establish the status of the email address validation before advising the participant or employer to reply again or taking another course of action.

There are videos that cover the email address validation process in detail and how to access records and manage statuses including how to resend messages for Timed-Out statuses. FIPS users should refer to these for further information.