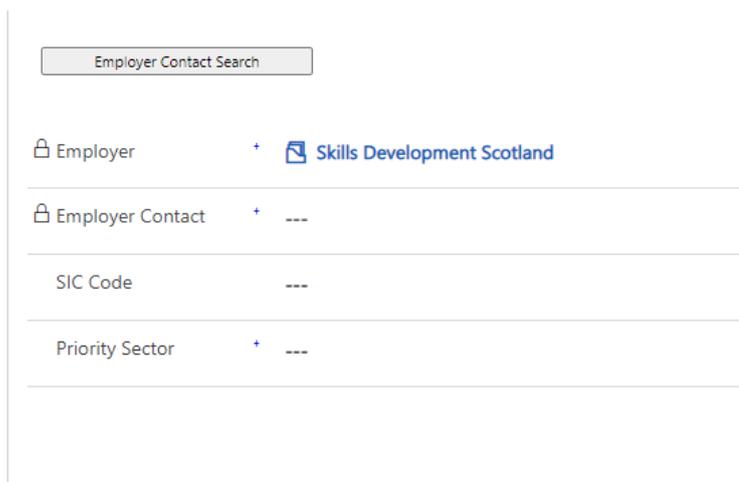


FIPS QUICK START GUIDE

Adding and Updating Employer Contacts

After an employer has been added to an application or assignment, Training Providers are required to search for an employer contact person associated with the employer. If their details do not already exist in FIPS, a new employer contact record must be created which will link this to the employer. This process ensures that the employer contact information (name, email address, contact number) is linked to the employer record. This guide will provide details on how to search for and create employer contact records when required.

1. Once an employer has been added to an application or assignment, the Employer Contact search can now be performed. For validation purposes (assignment and claim validation), employer contact information is mandatory. Employer contact first name, last name, email address and one contact number (mobile or landline) are required fields.
2. Click on the “Employer Contact Search” button to open the employer contact search fields:

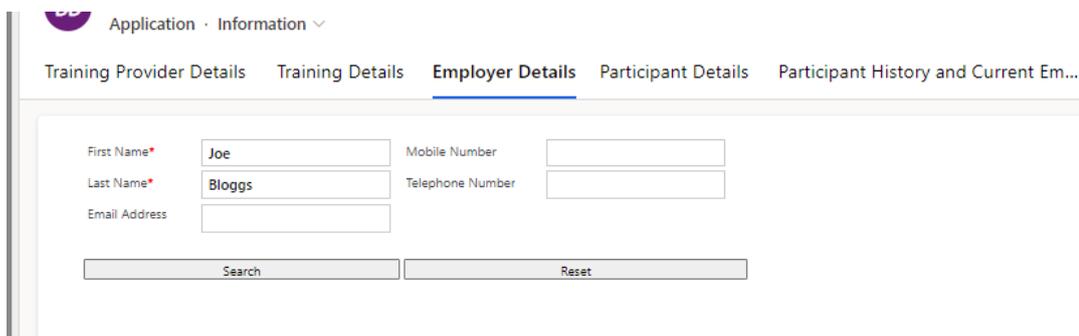


The screenshot shows a form titled "Employer Contact Search". It contains several fields:

- Employer:** A dropdown menu with a lock icon and a plus sign, currently showing "Skills Development Scotland".
- Employer Contact:** A dropdown menu with a lock icon and a plus sign, currently showing "---".
- SIC Code:** A dropdown menu with a plus sign, currently showing "---".
- Priority Sector:** A dropdown menu with a lock icon and a plus sign, currently showing "---".

- In an application this is under the **Employer Details** tab. In an assignment this is under **Update Employer** tab

3. Complete the fields within the search - **First Name** and **Last Name** are the only mandatory fields required to perform a search for an employer contact as denoted by the red asterisk:



The screenshot shows the "Employer Details" tab in a web application. The search form includes the following fields:

- First Name***: Input field containing "Joe".
- Last Name***: Input field containing "Bloggs".
- Email Address**: Empty input field.
- Mobile Number**: Empty input field.
- Telephone Number**: Empty input field.

At the bottom of the form are two buttons: "Search" and "Reset".

If there are no results returned, the other fields become mandatory when creating a new employer contact.

4. If results are returned, select the appropriate contact from the results using the “Select Employer Contact” button:

Training Provider Details Training Details **Employer Details** Participant Details Participant History and Current Em... Equality Details Gener...

First Name* Mobile Number

Last Name* Telephone Number

Email Address

Full Name	Employer Name	
Joe Bloggs	Joe Bloggs Corp	<input type="button" value="Select Employer Contact"/>

- Ensure the details entered in the search are accurate – spelling errors will stop results being returned that already exist if the details do not match exactly.
- Clicking on “Select Employer Contact” will attach the person to the application / assignment and the search is complete.

5. If no results are returned, add in the relevant contact information (email address and one contact number) then select “Create New Employer Contact”. A new employer contact record with the details input will be created and linked with the employer record:

Training Provider Details Training Details **Employer Details** Participant Details Pa

First Name* Mobile Number

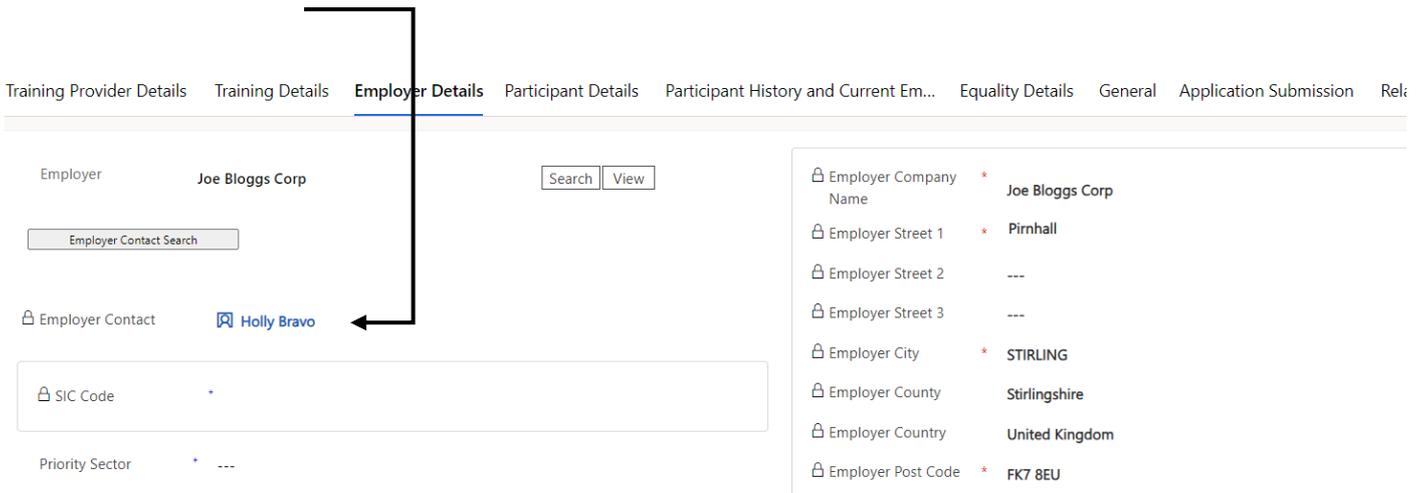
Last Name* Telephone Number

Email Address

No results returned

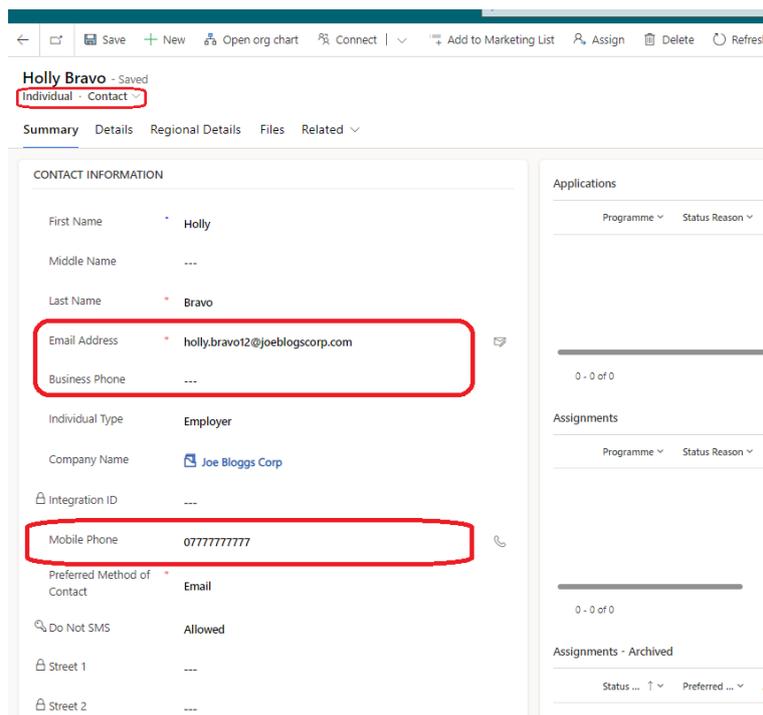
If a search is completed for a contact that has **been previously created** and linked to that employer, but no results are returned, raise a ticket with FIPS Support and provide the employer and employer contact details. There should be no duplicate employer contact records created. As an example, if a Training Provider is adding 5 new start assignments and **all have the same employer record** and have the same employer contact information, FIPS does not require that the employer contact is **created** for each assignment. The employer contact details should be created once and should then be displayed in the search results for Training Providers to select from the list for any other assignments when the employer record / employer contact person is the same. Employer organisation records and employer contact records are linked which means if the employer has had the employer contact added previously, it does not need to be created again.

6. Once complete, the employer contact name will be displayed in the Employer Contact field:



- To edit the email address or phone numbers for an employer contact person, click into the employer contact record by clicking on the employer contact name hyperlink (above). This will open the Employer Contact record where these changes can be made. This will update any assignments that have that employer contact record attached. Employer Contact names should not be amended in this way. For example, if a new person is responsible for the participant at the employer, do not change Holly Bravo to Sandra Smith using this method. A new employer contact should be searched / created for Sandra Smith to change the details on the assignment.
- The name details should only be edited in this screen when a person’s name has changed for legitimate reasons e.g., through marriage or other reasons.

7. The employer contact view (hyperlink) will open. Ensure the form view is set to “Individual: Contact”. The “Individual Type” field will show as Employer. Contact number(s) and email address can be edited / added in this view. Click into the field(s) to edit the details:



- If an employer contact person has changed completely e.g., a change of staff, the name details should not be edited in this screen. A new employer contact search should be performed to check if the details are already in FIPS. If not, create a unique employer contact record for the new person.
- Changes can be made to the contact information including email address from here. Click on Save on the ribbon bar to save any changes made to the record.

8. To change the employer contact information within an assignment, the process is the same as above but the fields will be displayed differently to the application. To change the details in full, the Employer Contact Search should be used. This is under the Update Employer tab. Scroll to the bottom of the page to view the button:

Assignment · Information ▾

Actions Actions (Canvas App) Training Provider Details Participant Details Update Equalities Information Participant History and Current Em... **Update Emplo...**

Current Employer

Employer **Skills Development Scotland** Search View

Current Employer Contact Details

🔒 Employer Contact * [Kenny Stewart](#)

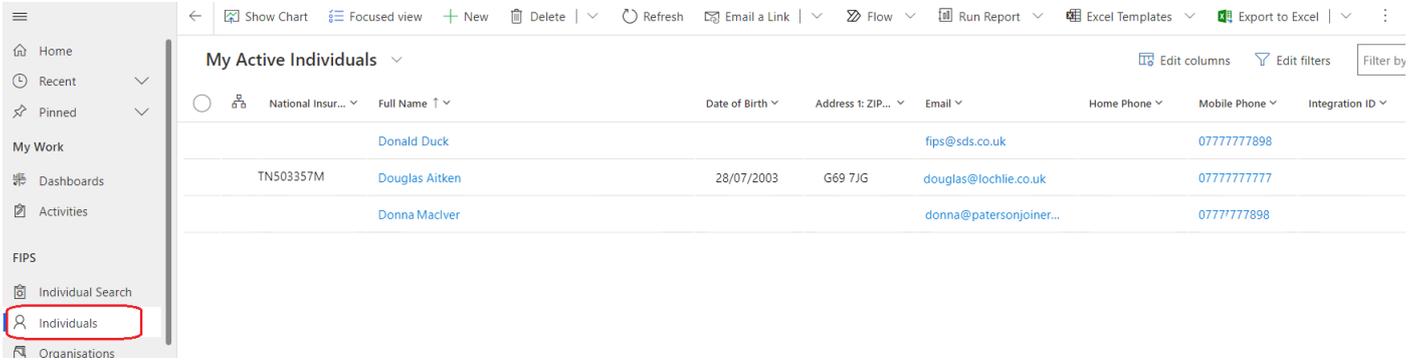
🔒 Employer Contact Telephone	0178681960.
🔒 Employer Contact Mobile	
🔒 Employer Contact Email	kennystewart@sds.co.uk

Priority Sector of Employer

Employer Contact Search

9. To amend the details for the employer contact within an assignment (e.g., the employer contact has had a change to email address or contact number(s)) click into the employer contact view by clicking on the Employer Contact name hyperlink. This will open the employer contact record and the details can be edited and saved. The individual contact (employer contact) screen will show as in point 7 (above).

10. Employer Contact records will be displayed within the Individuals entity in FIPS as well as participant records. Employer Contact records will not contain any personal information e.g., DOB, NI number, gender etc. the screenshot below displays two employer contacts and an individual (participant) listed within the Individuals entity:



	National Insur...	Full Name ↑	Date of Birth	Address 1: ZIP...	Email	Home Phone	Mobile Phone	Integration ID
		Donald Duck			fips@sds.co.uk		0777777898	
TN503357M		Douglas Aitken	28/07/2003	G69 7JG	douglas@lochle.co.uk		0777777777	
		Donna MacIver			donna@patersonjoiner...		0777777898	

- Donald Duck and Donna MacIver are employer contacts and Douglas Aitken is a participant record.
- **Changes to Employer Contact details can be made by accessing the records from within the Individuals entity (double click to open) following the steps described above – any changes will update any assignment records that have that Employer Contact attached to show the new information.**