

# FIPS Quick Start Guide

## How to input an MA Application / Assignment

The application is the second stage to creating an MA assignment in FIPS, following on from the Individual Search. To enable Providers to register an MA participant on FIPS, the following documents are required – Training Agreement & Equality Monitoring Form.

- Use the link icon below to access the FIPS landing page on the SDS corporate website which contains additional FIPS guides and user information.



### Entering an Application – points to note:

- In an application, there are multiple fields containing a blue cross which indicates the field is mandatory
- The application can be saved as a draft until it is completed and ready to be submitted to a draft assignment
- For any fields displaying the padlock symbol, FIPS will auto-populate these locked fields
- All tabs are shown across the top of the application. These can be completed in any order and once all relevant fields are complete, the Submit Application button will appear under the Application Submission tab
- Depending on the magnification / zoom settings on your browser, the tabs will be displayed or will be added to the ellipsis (...) menu which may mean some of the screenshots in this document do not match exactly with what users see. Depending on what tab is being viewed, the tabs will automatically re-order
- For all MA applications / assignments, the view at the top of the page must show as “Application: Information”. If this is showing a different programme, click on the dropdown icon and select the Application: Information form view:

The screenshot displays the SDS FIPS application interface. On the left is a navigation menu with sections: 'My Work' (Home, Recent, Pinned), 'Dashboards', 'Activities', 'FIPS' (Individual Search, Individuals, Organisations), 'User Request' (User Requests), and 'Extensions' (Additional Support, Adopt An Apprenticeship, Alerts, Applications). The main content area shows the application 'Blue Diamond - Unknown Contract - Saved'. A red box highlights the 'Application - Information' dropdown menu. Below this are tabs for 'Training Provider Details', 'Training Details', 'Participant Details', 'Participant History and Current Employment', and 'Equality Details'. The 'Training Provider Details' tab is active, showing fields for Name (Blue Diamond - Unknown Contract), Contract (---), and Programme (---). On the right, there is a sidebar with 'Upload participant' and 'Timeline' sections, including a search bar and a note entry field.

## Completing the Application

- **Training Provider Details** - The “Name” field will display the padlock symbol. This will be populated with the participant’s name originally entered during the Individual Search and will also state “Unknown Contract”. This will update automatically once the contract has been selected in the next field. Select or search for the Contract using the magnifying glass to select the relevant option:

BD Blue Diamond - Unknown Contract - Saved  
Application · Information ▾

Training Provider Details Training Details Participant Details Participant History and Cu

Name Blue Diamond - Unknown Contract

Contract Look for Contract

Programme Contracts

- September 2025 Training Team - GA - 2025 01/09/2025
- Sept25 Little Training Co - EF - 2025 01/09/2025
- Sept25 Little Training Co - MA - 2025 01/09/2025
- September 2025 Training Team - LBPAP - 2025 01/09/2025
- September 2025 Training Team - STEM - 2025 01/09/2025

+ New Advanced

- The “programme” field will display the padlock symbol. Save the application using the “save as draft” button and this field will be populated with the programme type (MA) depending on the contract selected. The contract name will also update on the application header and within the “name” field to include the contract name.

- Training Details** - Start Date and Expected End Date – add the relevant dates for the participant. Dates can be selected using the calendar which can be accessed by clicking on the calendar icon or manually entered using the DD/MM/YYYY format:

BD Blue Diamond - Sept25 Little Training Co - MA - 2025 - Saved  
Application · Information ▾

Training Provider Details Training Details Participant Details Participant History and Current Em... Equ

Start Date

Expected End Date

Qualification Details

Area of Scotland

Qualification

Sector Skills Council

Framework

Age at Start

Change to Training Category Required

Training Category

Off the Job Training i

The following fields should be populated as follows:

|                  |                                                                                                                                                                                                                                      |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Area of Scotland | This is a locked field which will auto populate once an employer has been added to the application.                                                                                                                                  |
| Qualification    | Use the wildcard (*) to search for the qualification, either using part of the name or the code. When the qualification is selected, the following fields will be auto populated. In this example “*Construction*” has been entered. |

Blue Diamond - Sept25 Little Training Co - MA - 2025 - Unsaved

Application · Information

Training Provider Details

Qualifications

GT9M 22-Accessing Operations and Rigging (Construction): Scaffolding-SCQF 5  
Construction: Specialist

GT9N 23-Accessing Operations and Rigging (Construction): Scaffolding and Offshore Scaffolding-SCQF 6  
Construction: Specialist

GT9P 22-Accessing Operations and Rigging (Construction): Steeplejacking-SCQF 5  
Construction: Specialist

Area of Scotland

Qualification

\*construction\*

Sector Skills Council

Framework

Awarding Body

Age at Start

Change to Training Category Required

Training Category

Off the Job Training as part of MA?

Training Venue

- If the incorrect qualification has been selected, use the cross to remove the data and perform the search again.
- The fields that contain a padlock symbol will be auto calculated by FIPS after the qualification has been selected – this is shown below:

Training Provider Details

Training Details

Participant Details

Participant History and Current Em...

Equality Details

Employer Details

General

Qualification Details

Area of Scotland

Qualification

Sector Skills Council

Framework

Awarding Body

Awarding Body Centre Number

Occupational Grouping

VQ Level

MA Centre Number

Staged Registration

Age at Start

Change to Training Category Required

Training Category

Off the Job Training as part of MA?

Training Venue

Expenses

Eligible for Rural Uplift funding

|                             |                                                                                                    |
|-----------------------------|----------------------------------------------------------------------------------------------------|
| Awarding Body Centre Number | Mandatory free text box. Enter the relevant code into the field.                                   |
| MA Centre Number            | Mandatory free text box. Enter the relevant code into the field.                                   |
| Staged Registration         | Not a mandatory field. This should only be completed when relevant for the qualification selected. |

The following fields will be automatically populated after the start date is entered:

- Age at Start
- Training Category

2. **Change to Training Category required** – This field will automatically default to no but can be manually adjusted to yes. This will enable Providers to select a different training category (age group). Any records that have a change made to this field will go for Manual Approval by SDS. This field is used for Enhanced Funding. Leave as the default of not processing Enhanced Funding
3. **Off the Job Training as part of MA** – select Yes or No for this field. If yes is selected, a Training Venue Search button will appear, and Training Venue field becomes mandatory:

The screenshot displays a form with the following fields and values:

- Framework: Automotive
- Awarding Body: Institute of the Motor Industry (IMI)
- Awarding Body Centre Number: ---
- Occupational Grouping: Automotive
- VQ Level: SCQF 6
- MA Centre Number: ---
- Staged Registration: ---
- Off the Job Training as part of MA?: Yes
- Training Venue: --- (with a red error message: "Training Venue: Required fields must be filled in.")
- Expenses: No

Below the main form, there is a section for the Training Venue search:

Training Venue: --- (with a red error message: "Required fields must be filled in.")

Search View

4. **Expenses field will default to No.** Change this to yes if required. Refer to the MA Programme Rules regarding eligibility.
5. The screenshot below shows an example of a completed Training Details tab. In this example, “Off the Job Training as part of MA?” has been set to Yes. Setting this field to Yes will reveal the “Training Venue” search field.

← 📄 🔄 SAVE AS DRAFT ⚙️ VALIDATION 🗑️ Delete 🔄 Refresh 🔍 Check Access 📋 Process ⚙️ Flow 📄 Word Templates 🗑️ Share

**Blue Diamond - Sept25 Little Training Co - MA - 2025** - Unsaved

Application - Information

Training Provider Details **Training Details** Participant Details Participant History and Current Em... Equality Details Employer Details General Application Submission Related

Qualification \*  Change to Training Category Required ☐ No

Sector Skills Council \*

Framework \*  Training Category \*  Off the Job Training as part of \* ☒ Yes

Awarding Body \*

Awarding Body Centre Number \*

Occupational Grouping \*

VQ Level \*

MA Centre Number \*

Staged Registration

Training Venue \*  Training Venue: Required fields must be filled in.

Expenses ☐ No

Eligible for Rural Uplift funding

Training Venue  Search View

Required fields must be filled in.

- If this field is set to No, the search button will not be displayed, and the next tab can now be completed. To perform a Training Venue search (if relevant), click into the field and start typing the name and address of the Training Venue. If an address option is displayed, click on this and "search". If no address is returned, search using the Training Venue name only:

Name and address:

Training Venue  Search View

Required fields must be filled in. Forth Valley College, Devon Road, ALLOA, Clackmannanshire, FK10

Required fields must be filled in. Forth Valley College Foundation, Princes Exchange, 1 Earl Grey Street, EDINBURGH, EH3

Name only:

Training Venue  Search View

Required fields must be filled in.

- If results exist in FIPS, these will be displayed in a list, click "select" to add the record to the application. If there are no correct results, use the Advanced Search option:

Training Venue  Search View

|        | Organisation                           | Address Line 1                           | Post Code | Email                         | Telephone |
|--------|----------------------------------------|------------------------------------------|-----------|-------------------------------|-----------|
| Select | FORTH VALLEY COLLEGE                   | DEVON ROAD, ALLOA                        | FK10 1PX  |                               |           |
| Select | CLACKMANNANSHIRE CAMPUS                | DEVON ROAD, ALLOA                        | FK10 1PX  |                               |           |
| Select | FORTH VALLEY COLLEGE ALLOA CAMPUS      | DEVON ROAD, ALLOA                        | FK10 1PX  |                               |           |
| Select | Forth Valley College - Alloa Campus    | DEVON ROAD, ALLOA                        | FK10 1PX  |                               |           |
| Select | FORTH VALLEY COLLEGE                   | DEVON ROAD, ALLOA                        | FK10 1PX  |                               |           |
| Select | Forth Valley College                   | Grangemouth Road, FALKIRK                | FK2 9AD   | iasha.craig@forthvalley.ac.uk |           |
| Select | Forth Valley College - Stirling Campus | Stirling Campus, STIRLING                | FK8 1SE   |                               |           |
| Select | Forth Valley College - Stirling Campus | Raploch Community Campus, STIRLING       | FK8 1SD   |                               |           |
| Select | TP2 - Forth Valley College             | 85 Whitecroft Business Centre, CLYDEBANK | G81 1GF   |                               |           |
| Select | CLACKMANNANSHIRE COUNCIL               | LAND SERVICES, ALLOA                     | FK10 1NU  |                               |           |

Required fields must be filled in. Advanced Search

- **Input the organisation name and address fields as required in the Advanced Search window and click Search:**

Advanced Search

|                |                      |                     |     |
|----------------|----------------------|---------------------|-----|
| Organisation   | Forth Valley College | DUNS Number         | --- |
| Address Line 1 | Devon Road           | Company Reg Number  | --- |
| Address Line 2 | ---                  | Scottish Charity No | --- |
| AddressLine 3  | ---                  | VAT Registration No | --- |
| Town / City    | ALLOA                | SIC Code            | --- |
| Region         | Clackmannanshire     |                     |     |
| Post Code      | FK10 1PX             |                     |     |
| Country        | GB                   |                     |     |
| Telephone      | ---                  |                     |     |
| Email          | ---                  |                     |     |
| Website        | ---                  |                     |     |

[Close](#)

- **If the required record is listed in the results with the correct address details, click on Select to attach it to the application.**
- **If no result is returned or the venue does not have the address required, a new venue can now be created. Use the “Notify Missing Organisation” link within the advanced search. Ensure that full address details and postcode have been entered:**

Advanced Search

|                |                      |                     |     |
|----------------|----------------------|---------------------|-----|
| Organisation   | Forth Valley College | DUNS Number         | --- |
| Address Line 1 | Devon Road           | Company Reg Number  | --- |
| Address Line 2 | ---                  | Scottish Charity No | --- |
| AddressLine 3  | ---                  | VAT Registration No | --- |
| Town / City    | ALLOA                | SIC Code            | --- |
| Region         | Clackmannanshire     |                     |     |
| Post Code      | FK10 1PX             |                     |     |
| Country        | GB                   |                     |     |
| Telephone      | ---                  |                     |     |
| Email          | ---                  |                     |     |
| Website        | ---                  |                     |     |

|                                       | Organisation                                                                | Address Line 1             | Post Code | Email | Telephone   |
|---------------------------------------|-----------------------------------------------------------------------------|----------------------------|-----------|-------|-------------|
| <input type="button" value="Select"/> | Forth Valley College                                                        | Devon Road, ALLOA          | FK10 1PX  |       | 01259215121 |
| <input type="button" value="Select"/> | Forth Valley College                                                        | Grangemouth Road, FALKIRK  | FK2 9AD   |       | 08456344444 |
| <input type="button" value="Select"/> | Board Of Management Of Forth Valley College Of Further And Higher Education | Main St Slamannan, FALKIRK | FK1 3EJ   |       | 01324403000 |

[Close](#)

- **This will create a draft Training Venue Organisation and you will be able to continue with the application submission.**
- **The Training Venue details will now be displayed in the Training Venue field.**

## Participant Details

6. Any details included in the Individual Search will be added into the application. All other fields will be blank. Complete all fields with the relevant data for the individual:

Blue Diamond - Sept25 Little Training Co - MA - 2025 - Saved

Application · Information

Training Provider Details Training Details **Participant Details** Participant History and Current Em... Equality Details Employer Details General Application Submission Related

Individual \* Blue Diamond

First Name \* Blue

Middle Name ---

Last Name \* Diamond

Date of Birth \* 03/05/2007

Temporary NI Number Required ☐ No

NI Number \* ---

SCN ---

Address Search / Update

Email Address \* ---

Mobile Phone Available ☐ No

Telephone Number (Home) \* ☐ No Available

Preferred Method of Contact \* ---

Post Code \* ---

Street 1 \* ---

Street 2 ---

Town/City \* ---

County ---

7. Temporary NI Number Required - the default for this field is “No”. If a Temporary National Insurance number is required, click on the field to change this to Yes. This will apply the locked symbol to the National Insurance Number field and FIPS will generate an NI number. The Temp NI will not be displayed until the gender field has been selected in the application (select this in the Equalities tab).

When a system generated temporary NI number is used, claims cannot be processed until this has been changed to an official NI number. This change can be processed by the Provider using the Change of Circumstance entity at a later date.

8. NI Number – this field will be blank if the participant has not been registered on FIPS before or the NI number was not included in the Individual Search. This is a free text box, and the NI number should be input.

The following fields should be populated as follows:

|                                       |                                                                                                                                                                                            |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scottish Candidate Number (SCN)       | Complete this if known. This is not a mandatory field at this stage. Will become mandatory when claims are made.                                                                           |
| Mobile Number / Home Telephone Number | These fields default to No. To add a contact number, click into the field and select “Yes”. A free text box will be displayed for the number to be added. One contact number is mandatory. |
| Email Address                         | This is a mandatory field and must be completed prior to submitting the application.                                                                                                       |

|                             |                                                                                                                                                                                                                              |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Preferred Method of Contact | Select SMS or E-mail depending on the participant preference. Validation messages will be sent from FIPS to the details entered. PMOC can be edited after an assignment has been generated in the Individual Contact screen. |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

9. **Address Search - Use the Address Search / Update button to reveal the fields to search for the participant home address if the address fields are blank or need updated:**

- The address search must be performed in Address Line 1. The “Change Country” option should be left unchanged.
- A search can be performed using the street name / house name / town / or postcode or a combination of this information in Line 1:

Select the address which will autofill the address fields. Click on Update Address to attach the details to the application

If the required address does not appear in the list displayed, ensure the details are accurate using the Royal Mail Postcode Finder in the first instance. If it is a new build address and not yet listed, select another address from the list to continue with the application. Generate an assignment then submit a User Request to the FIPS Support Team to update the details. Provide the correct address and relevant participant details for this to be manually changed.

- The screenshot below shows an example of a completed Participant Details section. Click into Participant History and Current Employment Status tab to continue:

### Participant History and Current Employment Status

10. The following six fields should be populated as follows:

|                        |                                                     |
|------------------------|-----------------------------------------------------|
| Employed               | Pre-populated by FIPS as all MA's must be employed. |
| Length of Unemployment | Mandatory field. Select from the drop-down list.    |
| Current Role Length    | Mandatory field. Select from the drop-down list.    |
| Employed Length        | Mandatory field. Select from the drop-down list.    |
| Employment Status      | Mandatory field. Select from the drop-down list.    |
| Pre-Employment Status  | Mandatory field. Select from the drop-down list.    |
| SCQF Level Held        | Mandatory field. Select from the drop-down list.    |
| SOC 2020               | Mandatory field. Select from the drop-down list.    |

For any of the drop-down fields listed above, select the relevant option using the magnifying glass lookup. Some of these fields are drop-down menus – select the relevant option.

BD Blue Diamond - Sept25 Little Training Co - MA - 2025 - Unsaved  
Application · Information ▾

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

Employed \* Yes Pre-Employment Status \* --Select--

Length of Unemployment \* Look for Length of Unemployment SCQF Level Held \* --Select--

Current Role Length \* Durations

Employed Length \* <1 Month

Employment Status \* 01 to 03 Months

04 to 06 Months

07 to 09 Months

10 to 12 Months

+ New Advanced

School Pupil

College Student

Unemployed

Working for a different employer

Looking after home or family

On job/skills training course

Made redundant

University Student

Don't know/Can't remember

Other

The screenshot below shows the lookup for the SOC code. In this example, the wildcard (use of asterisks) is used to search for part of the word – *Engin* – which will display all results containing this. From the results, click on the required option. The SOC code for engineering has been used in this example. Select the relevant code from the list. “New SOC Code” should not be used:

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

Employed \* Yes Pre-Employment Status \* On job/skills training course

Length of Unemployment \* <1 Month SCQF Level Held \* SCQF 10

Current Role Length \* 01 to 03 Months SOC 2020 \* \*engin\*

Employed Length \* 04 to 06 Months Job Title \* SOC Codes

Employment Status \* Full Time Prior Achievement \* 3119 Science, engineering and production technicians n.e.c.

3114 Building and civil engineering technicians

3113 Engineering technicians

2481 Quality control and planning engineers

2129 Engineering professionals n.e.c.

+ New Advanced

The following fields should be populated as per the below:

|                   |                                                                                                                                                                                        |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Job Title         | Mandatory free text field.                                                                                                                                                             |
| Prior Achievement | Free text box - only enter prior achievement that is related to the qualification that the participant is being input for. Providers should contact their SIA for further information. |

The below screenshot shows a completed example of this tab:

| Training Provider Details | Training Details     | Participant Details   | Participant History and Current Em... | Equality Details | Employ |
|---------------------------|----------------------|-----------------------|---------------------------------------|------------------|--------|
| Employed                  | +  Yes               | Pre-Employment Status | + On job/skills training course       | ▼                |        |
| Length of Unemployment    | +  <1 Month X        | SCQF Level Held       | +  SCQF 7 X                           | ▼                |        |
| Current Role Length       | +  01 to 03 Months X | SOC 2020              | +  3114 Building and civil en... X    | ▼                |        |
| Employed Length           | +  04 to 06 Months X | Job Title             | + Test Engineer                       |                  |        |
| Employment Status         | + Full Time          | Prior Achievement     | SCQF 5 in Engineering                 |                  |        |

- If any of the details input are incorrect, hover over the field(s) and use the X to remove the details. Select the correct information from the drop-downs.

## Equality Details

- The Equality Monitoring Form should be used to populate this section. Follow the guidance on the form regarding destruction of the relevant section of the form once the information has been entered to FIPS in line with GDPR legislation. Due to the sensitive nature of this data, Providers will be unable to view or report on this in FIPS once input. Select the relevant options for each field:

| Training Provider Details                            | Training Details                                 | Participant Details | Participant History and Current Em... | Equality Details | Employer Details | General | Application Submission | Related |
|------------------------------------------------------|--------------------------------------------------|---------------------|---------------------------------------|------------------|------------------|---------|------------------------|---------|
| Equalities                                           |                                                  |                     |                                       |                  |                  |         |                        |         |
| Ethnic Group                                         | + ---                                            |                     |                                       | ▼                |                  |         |                        |         |
| Gender                                               | + ---                                            |                     |                                       | ▼                |                  |         |                        |         |
| Transgender                                          | + ---                                            |                     |                                       | ▼                |                  |         |                        |         |
| Religion or Belief                                   | + ---                                            |                     |                                       | ▼                |                  |         |                        |         |
| Sexual Orientation                                   | + ---                                            |                     |                                       | ▼                |                  |         |                        |         |
| Care Experience                                      | + --Select--                                     |                     |                                       | ▼                |                  |         |                        |         |
| Impairment, health condition or learning difficulty? | + <input checked="" type="checkbox"/> --Select-- |                     |                                       | ▼                |                  |         |                        |         |
|                                                      | Yes                                              |                     |                                       |                  |                  |         |                        |         |
|                                                      | No                                               |                     |                                       |                  |                  |         |                        |         |
|                                                      | Prefer Not To Say                                |                     |                                       |                  |                  |         |                        |         |

**Impairment, Health Condition or Learning Difficulty field** – select the appropriate option from the drop-down menu. If Yes is selected, sub-fields will be displayed. The default for the sub-fields is no; click to update to yes for any that apply to the individual.

Impairment, health condition or learning difficulty? ☒ Yes

ⓘ Impairment, health condition or learning difficulty?: Please Note: At least one impairment listed below must be set to Yes for this to be Yes

---

**Disability Detail**

|                                 |                          |                     |                          |                              |                          |
|---------------------------------|--------------------------|---------------------|--------------------------|------------------------------|--------------------------|
| Social Communication Impairment | <input type="radio"/> No | Hearing Impairment  | <input type="radio"/> No | Specific Learning Difficulty | <input type="radio"/> No |
| Learning Disability             | <input type="radio"/> No | Physical Impairment | <input type="radio"/> No | Long Standing Illness        | <input type="radio"/> No |
| Visual Impairment               | <input type="radio"/> No | Mental Health       | <input type="radio"/> No |                              |                          |
| Other Disability                | <input type="radio"/> No |                     |                          |                              |                          |
| Prefer Not to Say               | <input type="radio"/> No |                     |                          |                              |                          |

- The information shown above is for example purposes only.

## **Employer Details**

Save the application before searching for employer details. Use the Save as Draft button on the top menu bar. FIPS will return to the first tab (Training Provider Details) when save is clicked. Click back into the Employer Details tab to continue.

12. To search for an employer, click into the 'Employer' field and start typing the name of the organisation required. A list of interactive addresses will be displayed as you input details; disregard this and search only the organisation name and click Search:

BD Blue Diamond - Sept25 Little Training Co - MA - 2025 - Saved

Application · Information ▾

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

---

Employer

Employer Contact

Employer Contact Search

Priority Sector  ▾

13. A list of results will be returned. If the required organisation is displayed, click “select” to attach that employer to the application:

Employer **Brown and Co Properties**

|                                       | Organisation               | Trading Name               | Address Line 1                                       | Post Code | Source |
|---------------------------------------|----------------------------|----------------------------|------------------------------------------------------|-----------|--------|
| <input type="button" value="Select"/> | WM Brown and Co Ltd        | WM Brown and Co Ltd        | Unit 2, GLASGOW                                      | G43 1QN   | 002    |
| <input type="button" value="Select"/> | AVERY AND CO               | AVERY AND CO               |                                                      |           | 002    |
| <input type="button" value="Select"/> | McGill and Co Limited      |                            | Harrison Road, DUNDEE                                | DD2 3SN   | 002    |
| <input type="button" value="Select"/> | Edmiston Brown Co Ltd      |                            | 1a Burntbroom Court<br>Burntbroom Street,<br>GLASGOW | G33 4DZ   | 002    |
| <input type="button" value="Select"/> | Good and Proper Deli Co.   |                            | 74 Raeburn Place,<br>EDINBURGH                       | EH4 1HJ   | 002    |
| <input type="button" value="Select"/> | Thomas Sherriff and Co Ltd | Thomas Sherriff and Co Ltd | Backburn, HADDINGTON                                 | EH41 4NN  | 002    |
| <input type="button" value="Select"/> | HATS AND CO LLP            |                            | Highdown House,<br>LEAMINGTON SPA                    | CV31 1XT  | 002    |
| <input type="button" value="Select"/> | PETER MCKERRAL & CO LTD    | Peter McKerral and Co      | Darlochan, CAMPBELTOWN                               | PA28 6NT  | 002    |
| <input type="button" value="Select"/> | Thomas Sherriff and Co Ltd | Thomas Sherriff and Co Ltd | Old Bongate Mill,<br>JEDBURGH                        | TD8 6DU   | 002    |
| <input type="button" value="Select"/> | Thomas Sherriff and Co Ltd | Thomas Sherriff and Co Ltd | 150-156 Galashiels Road,<br>GALASHIELS               | TD1 2RA   | 002    |

- If the required employer details are not returned in the initial search using only the employer’s name, update the employer search field to include part of the address details and search again. This will change the results as the search is being expanded to include an address. If the employer required is now returned, click on Select to attach it to the application. If no results are returned, the Advanced Search can be selected to search for employers on an external data source. This is covered in more detail in separate employer search guidance. Please refer to this for information on how to search for employers and creating new records when required.

14. Once an employer has been selected, the SIC Code (Standard Industrial Classification Code) will be displayed. This is a locked field that may auto populate based on the Employer organisation selection. If there is nothing visible in this field, it can be disregarded. Priority Sector is a yes / no selection, and this must be selected as this is a mandatory field:

Training Provider Details Training Details Participant Details Participant History and Current Em... Equality Details **Employer Details** General Application Submission

Employer **WM Brown and Co Ltd**

Employer Contact ---

SIC Code \*

Priority Sector \* ---

Employer Company Name \*

Employer Street 1 \*

Employer Street 2

Employer Street 3

Employer City \*

Employer County

Employer Country

Employer Post Code \*

15. For validation purposes (assignment and claim validation), employer contact information is mandatory. Employer Contact Name, Email Address and one contact number are mandatory fields when inputting a new MA application. Click on the Employer Contact Search button to search for the employer contact details:

The screenshot shows a web application interface with a top navigation bar containing links: Training Provider Details, Training Details, Participant Details, and Participant History and Current Err. The main form area has a section for 'Employer' with the text 'WM Brown and Co Ltd' and buttons for 'Search' and 'View'. Below this is an 'Employer Contact' field with a dropdown arrow and a 'View' button. A red box highlights the 'Employer Contact Search' button. Further down are fields for 'SIC Code' and 'Priority Sector' (set to 'No').

- An initial search can be performed using first and last name only:

This screenshot shows a 'Contact Details' modal window. It contains fields for 'First Name' (Bruce) and 'Last Name' (Boyle), a 'Close' button, and a 'Search' button highlighted with a red box. The background shows the 'Employer Contact' field with a dropdown arrow and the 'Employer Contact Search' button.

- If a matching result is displayed, select this to attach to the application. Click on "Select". The screen will refresh, and the details will be added to the application within the Employer Contact field.

This screenshot shows the 'Contact Details' modal window with a table of results. The 'Select' button is highlighted with a red box. The table has columns for 'Contact' and 'Employer Name'. The background shows the 'Employer Contact' field with a dropdown arrow and the 'Employer Contact Search' button.

| Contact     | Employer Name       |
|-------------|---------------------|
| Bruce Boyle | WM Brown and Co Ltd |

- If no results are returned that match the search, a new employer contact must be created. Click on Create New Employer Contact to open the fields:

Contact Details

First Name Doug

Last Name Hope

No results returned: Please ensure record has been saved prior to Employer Contact Search

Search

Close

Create New Employer Contact

- Input the relevant contact information and click on “Create” to attach the information to the application:

Create Contact

First Name Doug

Last Name Hope

Email Address fips@sds.co.uk

Mobile Number 0777777777

Telephone Number ---

Close

Create

- The employer and employer contact fields will now be complete. Any changes required to the employer contact data e.g., telephone number or email address can be amended by clicking “View” next to the Employer Contact name.
- This will open the employer contact record. Changes can be made and saved. This will update any related applications / assignments with the new information. Providers should not change the name in full e.g., changing the record from Doug Hope to Bob Smith. In this instance, a new employer contact should be created in full if required, by completing the employer contact search again.

## General

16. The General tab contains reference fields and other fields used internally by SDS. There are 7 reference fields for MA records that can be used by Providers to input information that can be reported / queried using Advanced Find. The example below contains 4 completed reference fields:

BD Blue Diamond - Sept25 Little Training Co - MA - 2025 - Unsaved  
Application · Information ▾

Training Provider Details Training Details Participant Details Participant History and Current Em... Equality Details Employer Details **General** Application Submission Related ▾

ESF Dossier Number --- Submission Date ---

ESF Project --- Assignment Generated ---

ESF Area Lowlands and Uplands × Status Reason Draft

Training Provider Reference 1 James Ash Training Provider Reference 5 ---

Training Provider Reference 2 Kirkton Site Training Provider Reference 6 ---

Training Provider Reference 3 Warehouse 5 Training Provider Reference 7 ---

Training Provider Reference 4 Cohort Aug 25

- Entering reference data (as shown above) will enable Advanced Find queries to be created using the information in the reference fields to report on assignment / participant information by FIPS users if required.

## Validating an Application and Submitting to a Draft Assignment

17. Applications will be displayed within the Applications entity on the workplace menu. When submitted to an Assignment, the Assignments entity should be used to locate the record.
- The Application Submission tab will be blank until the application has been validated. Using the Validation button at the top of the application validates that all fields have been completed. If any mandatory fields have been missed, hitting the Validation button will highlight any incomplete fields:

SDS FIPS Search

✖ You have 2 notifications. Select to view.

✖ Awarding Body Centre Number : Required fields must be filled in.

✖ MA Centre Number : Required fields must be filled in.

BD Blue Diamond - Sept25 Little Training Co - MA - 2025 - Unsaved  
Application · Information ▾

Training Provider Details Training Details Participant Details Participant History and Current Em... Equality Details Employer De

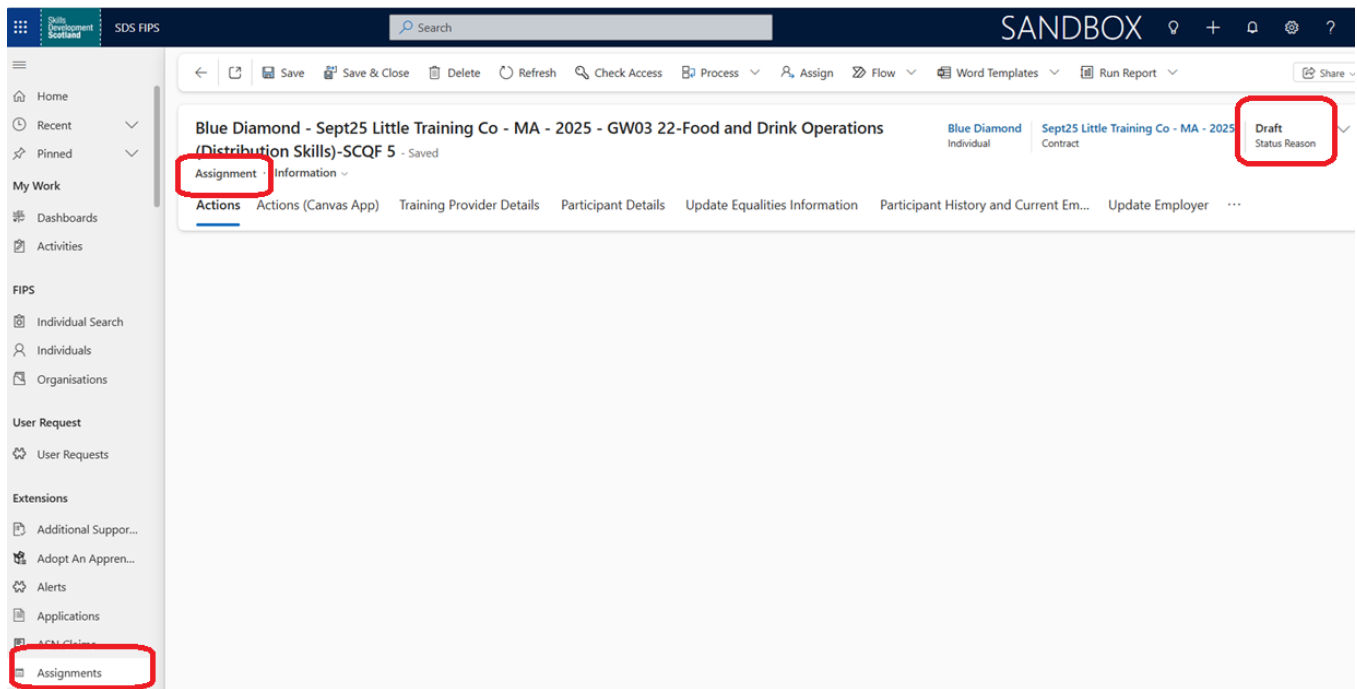
ESF Dossier Number --- Submission Date ---

- In this example, 2 notifications are displayed. Click on the pink ribbon to display the notification details. Resolve any errors then click into the Application Submission tab to access the Submit Application button.

There are certain fields that FIPS does not highlight when the data is missing / incomplete. If the “Submit Application” button does not appear after clicking on Validation and no errors are displayed in the ribbon bar, check the following fields have been completed – Participant home address – use the list to select the address. Training Category field, Employer Contact, Off the Job Training – ensure a training venue has been added if Off the Job Training field is set to Yes. Area of Scotland – if this is blank, raise a User Request with FIPS Support. Update any required fields and click on Validation again. The Submit Application button should now be displayed under the Application Submission tab.

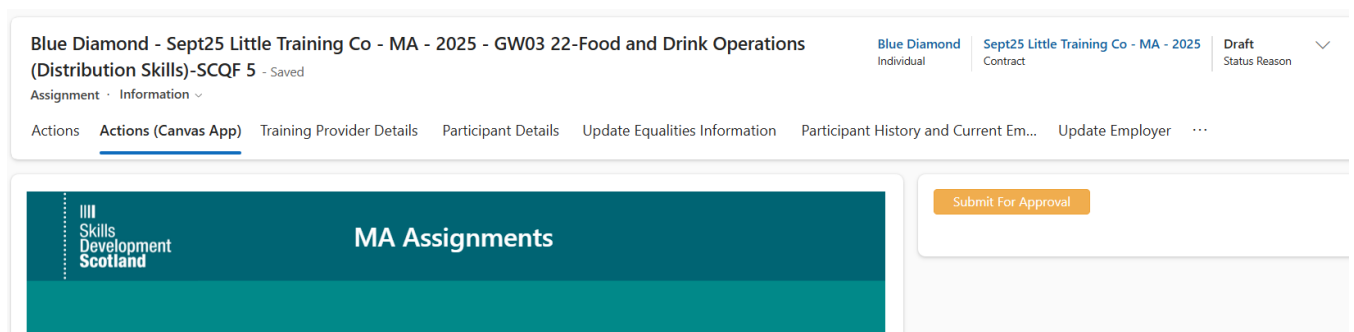
- **To submit the application to a Draft Assignment, click on Submit Application. A confirmation box will be displayed that contains a declaration. Read the declaration and select “Yes” to agree to submit the application. If Reject is selected, the assignment will not be generated, and the record will remain in the application stage:**

- If there are no issues returned, a confirmation message will be displayed at the top of the screen. Click OK to view the Draft Assignment. Accepting the declaration completes the Application submission. The record now exists as an Assignment, in Draft status.



Record as highlighted above is now a Draft Assignment. It must be submitted for approval to complete the application / assignment submission.

- **All the information input on the application will be displayed in the fields in the draft assignment. Double check this is all accurate and make any amendments if necessary. Under the Actions Canvas App tab, the Submit for Approval button will be displayed:**



- Once submitted, the status will update from Draft to Manual Approval Required or Unconfirmed.
  - If the individual has previous training history or funding in FIPS, the system will set the status to Manual Approval Required. The MA Contracts team will manually check and approve or reject in this instance.
  - If there is no history detected, the status will automatically go to Unconfirmed. This means that the assignment is active, and the new start validation will be sent via the participant's preferred method of contact.

Providers should refer to the guidance on Validation for more information on the new start assignment validation process and how to manage this to ensure assignments are updated to Confirmed status.