# FIPS QUICK START GUIDE

## Using Individual Search in FIPS

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**Individual Search is used to search for participant details before entering an application into FIPS. It is the first step in generating an assignment for all programmes (except ITA). This guide will provide best practice for searching participant details in FIPS.**

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**There is a video that covers this process – click the play button to view this.**

1. **The Individual Search function is listed on the Workplace menu:**
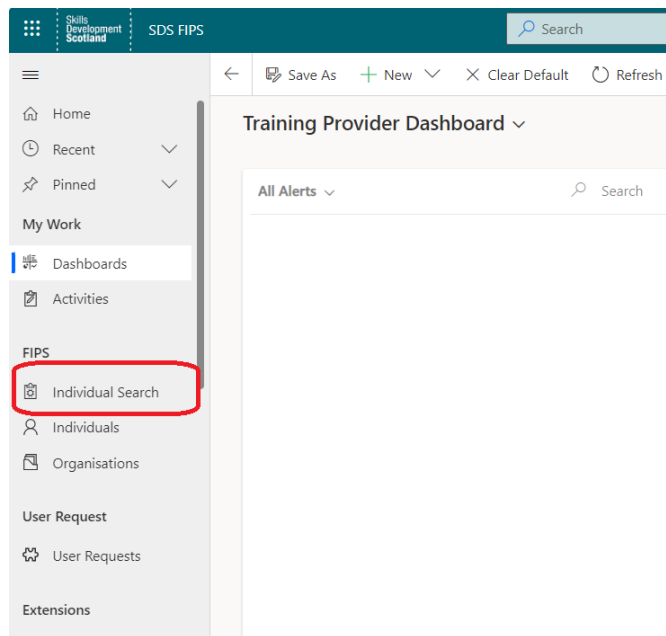


2. **The results returned for an Individual Search are generated from multiple SDS data sources. To ensure the results returned are as wide ranging as possible, search using the following information in the first instance – forename, surname, DOB:**



Click on Search. If there are results that match the details, they will be displayed in a table below the search function.

3. **The screenshot below shows the results for this example search. All data displayed is fictitious:**



- The View Payment History button will display any previous funding linked to the individual

4. **Review the participant details returned and if certain that the results displayed match the individual required, click on Create New Application:**



If there are no results returned for a candidate that you have previously registered on FIPS, search again by updating the search to include the NI number or SCN. Click on "Reset" to do this. If there are no results for the participant in this instance, contact the FIPS Support Team for further guidance.

5. **If no results are returned, a new individual can be created by clicking "Create New Application":**

6.   If the results returned do not match the individual you require, a new individual can be created by clicking "Not Listed, Create New Application":



-   **In the example above, "Not Listed, Create New Application" should be clicked only when the majority of the information returned in the result does not match the participant required. For example, if first name, last name and DOB are the same however NI number, SCN and address does not match the details the participant has provided, the "Not Listed" option should be used.**

-   **If the details displayed match the individual you are searching for with a few differences (e.g., address details) do NOT use the "Not Listed, Create New Application" option. Use the results returned and select "Create New Application". Any out of date information (e.g., home address) can be updated by within the Participant Details section when the application opens.**

7.   **When Create New Application is selected, a popup will appear on screen to confirm that FIPS has created a new application and will prompt you to select OK to view. Click on OK to open the draft application:**
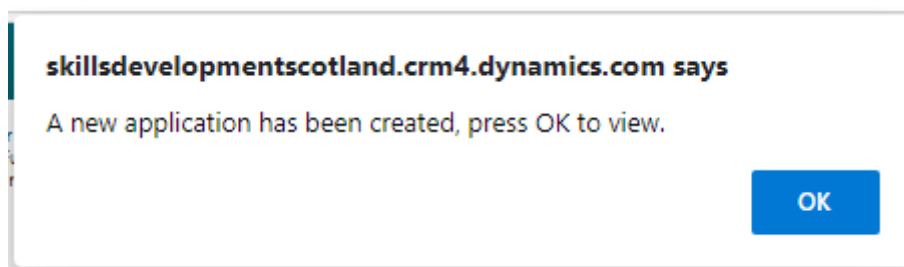


-   If any errors are received during the search (e.g., Duplicate NI number / Home phone number not in correct format) raise a ticket with FIPS Support using the User Requests entity and provide the participant information for this to be investigated.

FIPS users should now refer to the Quick Start Guide for Entering an Application.

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