# FIPS Quick Start Guide

How to Use Individual Search

Individual Search must be used to search for participant details before entering an application into FIPS. It is the first step in generating an assignment for all programmes, with the exception of ITA. This guide will provide best practice for searching participant details in FIPS.

➢ The links below provide a tutorial demonstration of how to use the individual search. Click on play to view this, or right click and select Open in Browser to access it directly. Use the link icon to access the FIPS landing page on the SDS corporate website which contains additional FIPS guides and user information.
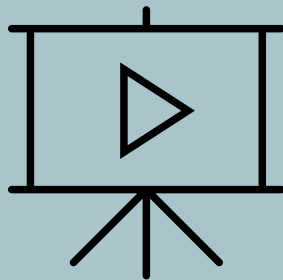
1. **Individual Search is located at the top of the FIPS extension menu:**
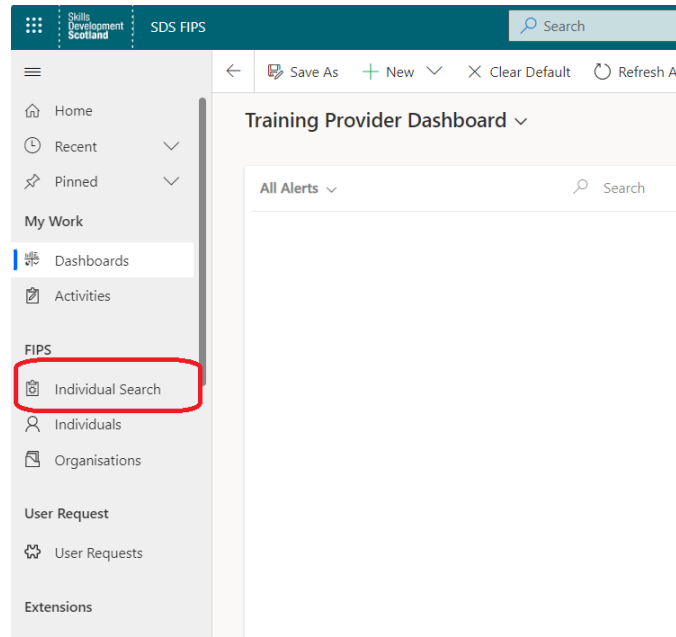
1. **The search contains multiple fields that can be used to search. The results returned for an Individual Search are generated from multiple SDS data sources. To ensure the results returned are as wide ranging as possible, search using the following information in the first instance – forename, surname, DOB:**
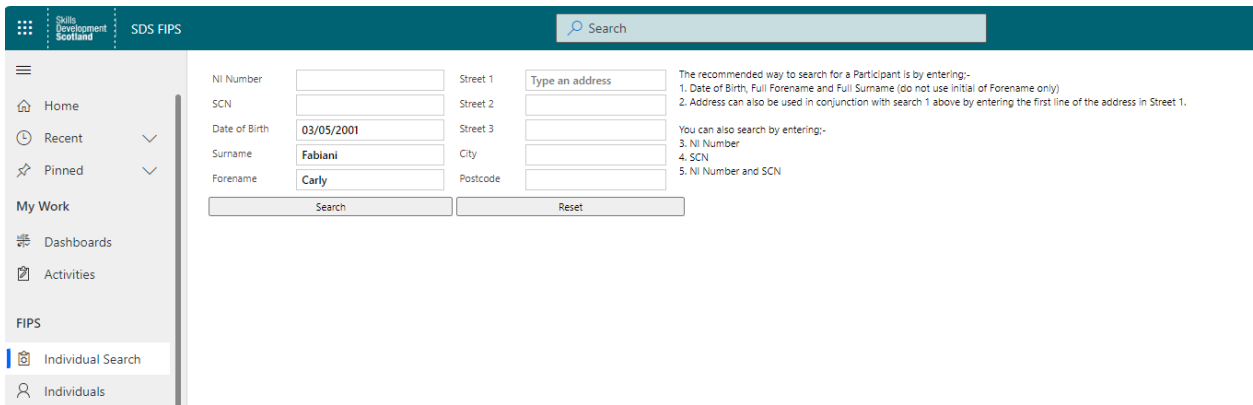
➢ Click on Search. If there are results that match the details, they will be displayed in a table below the search fields.

The screenshot below shows an example of the information returned for the search:
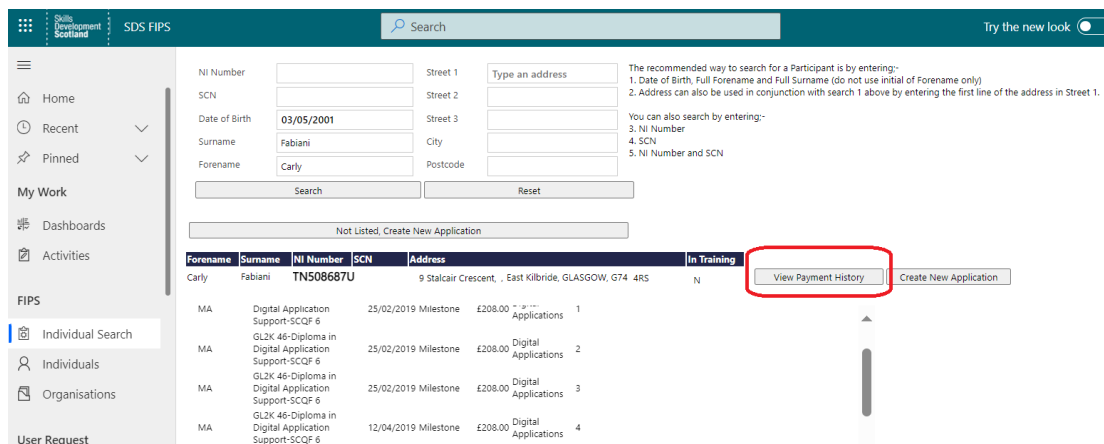
- **The View Payment History button will display any previous funding linked to the individual**
- **The "In Training" field will indicate if the participant has an active assignment in FIPS. If this shows as "Y", users can still click on the result and create an application. Depending on the programme / current status of any training, FIPS will stop the application from being submitted for approval, but does not stop the application from being created and the relevant details input**
- **Review the participant details returned (if there are results returned), and if certain that the result displayed matches the individual you require, click on Create New Application:**

- **If no results are returned, click on Create New Application:**

- If there are results retuned but these do not match the person you require, use the **Not Listed, Create New Application** button.

- **In the example above, "Not Listed, Create New Application" should be clicked <u>only</u> 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 some differences (e.g., home address details) do <u>NOT</u> 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 within the Participant Details section when the application opens.**

2. **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 (name and NI number, and / or date of birth) for this to be investigated.

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