Skills Development **Scotland**

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.



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Created by FIPS Support Team

1. Individual Search is located at the top of the FIPS extension menu:



 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:

-							
	Skills Development Scotland	SDS FIPS				✓ Search	
≡ ଜ	Home	1	NI Number SCN		Street 1 Street 2	Type an address	The recommended way to search for a Participant is by entering;- 1. Date of Birth, Full Forename and Full Sumame (do not use initial of Forename only) 2. Address can also be used in conjunction with search 1 above by entering the first line of the address in Street 1.
Ŀ	Recent	\sim	Date of Birth	03/05/2001	Street 3		You can also search by entering;- 3. NI Number
\$7	Pinned	\sim	Forename	Carly	Postcode		4. SCN 5. NI Number and SCN
My ۱	My Work			Search		Reset	
**	Dashboards Activities						
FIPS							
Ĉ	Individual Sea	rch					
8	Individuals						

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:

	Skills Development Scotland	SDS FIPS				₽ Search	earch						Try t	he new look 💽
=			NI Num	ber		Stree	t1 [Type an addres	5	The recommended way to 1. Date of Birth, Full Forer	o search for a Pa name and Full Si	articipant is by enterir urname (do not use ii	ng;- nitial of Forename only)	
ŵ	Home	I	SCN			Stree	t 2			2. Address can also be us	ed in conjunctio	on with search 1 abov	e by entering the first line of	the address in Street 1.
0	Recent		Date of	Birth	03/05/2001	Stree	t 3			You can also search by er	ntering;-			
0	necent	Ť	Surnam	e I	Fabiani	City				4. SCN				
Ż	Pinned	\sim	Forenan	ne	Carly	Posto	ode:			5. NI Number and SCN				
My	My Work		Search				Reset							
<u>111</u>	비프 Dashboards			Not Listed, Create New Application										
Ê	Activities	- 1	Forename Surname NI Number SCN Address						In Training				ו	
			Carly	Fabiani	TN508687U	9 Stalca	air Crescent	, , East Kilbride,	SLASGOW, G7	74 4RS N	View I	Payment History	Create New Application]
FIPS	5		МА	Digital	Application	25/02/2019 Milesto	one £208	3.00 Applications	1					
尙	Individual Sea	rch		Suppor GL2K 4	rt-SCQF 6 6-Diploma in			Digital				^		
Q	Individuals		MA	Digital Suppor	Application rt-SCQF 6	25/02/2019 Milesto	one £208	3.00 Applications	2					
	Organisations		МА	GL2K 4 Digital Suppor	6-Diploma in Application rt-SCQF 6	25/02/2019 Milesto	one £208	3.00 Digital Applications	3					
Use	r Request		МА	GL2K 4 Digital Suppor	6-Diploma in Application rt-SCQF 6	12/04/2019 Milesto	one £200	3.00 Digital Applications	4					

- 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:

	Skills Development Scotland	SDS FIPS			✓ Search					Try the new loc		
≡			NI Number		Street	1 Type an addr	ess	The recommended way to 1. Date of Birth, Full Forena	search for a Participant is by ente ame and Full Surname (do not use	ring;- : initial of Forename only)		
命	Home		SCN		Street	2		2. Address can also be used in conjunction with search 1 above by entering the first line of th				
0	Recent	\sim	Date of Birth	03/05/2001	Street	3		You can also search by ent- 3. NI Number	ering;-			
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52	Pinned	$\sim$	Forename	Carly	Postco	de		5. Ni Number and Sch				
My	Work	- 1		Search		Reset						
ill ill ill i	Dashboards			Not L	isted, Create New Appl	ication						
Ŕ	Activities	- 1	Forename Sur	name NI Number S	CN Address			In Training				
		- 1	Carly Fabi	ani TN508687U	9 Stalcai	r Crescent, , East Kilbrid	e, GLASGOW, G74	4RS N	View Payment History	Create New Application		
FIP	FIPS		MA D	ligital Application	25/02/2019 Mileston	e £208.00 Applicatio	ns 1					
â	Individual Sear	rch	G	iL2K 46-Diploma in		Digital						
8	Individuals		MA D	upport-SCQF 6	25/02/2019 Mileston	e £208.00 Applicatio	ns 2					

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

luca		Postcode					
Search			Reset				
No results returned.							
	Create New A	pplication					
	luca Search	Search No results retu Create New Ap	Iuca Postcode   Search No results returned.   Create New Application	Iuca Postcode   Search Reset   No results returned. 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.

NI Number SCN Date of Birth Surname	03/05/ Fabiani	2001	Street 1 Street 2 Street 3 City	Type an a	ddress     1       2     2       3     3       4     5	he recommended way to search for a Participa . Date of Birth, Full Forename and Full Surname . Address can also be used in conjunction with 'ou can also search by entering;- . NI Number . SCN . NI Number and SCN	nt is by entering:- e (do not use initial of Forename only) search 1 above by entering the first line of the	address in Street 1.
Forename	Carly		Postcode					
	Sear	rch		Rese	t	]		
		Not Listed, C	reate New Applicat	on		]		
Forename	Surname	NI Number	SCN Addr	:55	In Training			
Carly	Young		No ac	dress held	N	View Payment History	Create New Application	

- 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.