FIPS Quick Start Guide

Employer Contact Search

Skills Development Scotland

An employer contact person's details must be input on an application / assignment after the employer details have been added or changed for a participant. If the employer contact does not already exist in FIPS, a new employer contact record should be created which will link the employer contact details (name, contact number and email address) to the employer. This guide will cover how to search for an employer contact and how to create records when no result is returned. It also provides details on how to edit contact details for existing records. There is a separate guide that covers how to perform the employer search.

➢ The links below provide a tutorial demonstration of how to perform the employer 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.
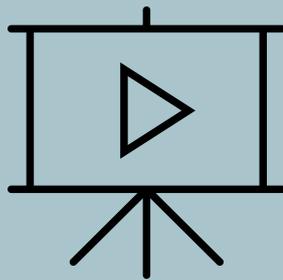
Employer Contact Search

1. **After an employer has been added to an application or assignment, the Employer Contact search can now be performed. For assignment and claim validation purposes, employer contact information is mandatory. Employer contact first name, last name, email address and one contact number (mobile or landline) are required fields when creating a new employer contact record.**

2. **After the employer has been added, click on Save as Draft on the application. Once saved, click on the "Employer Contact Search" button within the Employer Details tab to perform the employer contact search:**
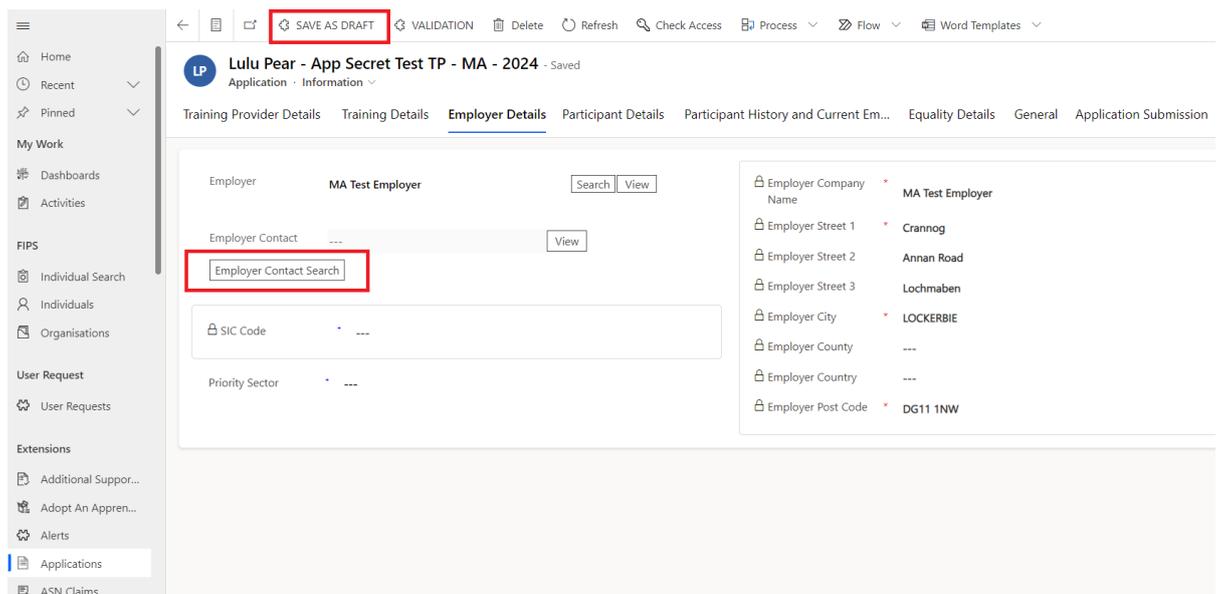
- In an **assignment**, use the Update Employer tab to access the Employer Contact Search button. The following steps are the same when searching in an assignment, however the steps have been demonstrated in an application.

3. **To begin the search, first and last name are the only mandatory fields. Input this information, then click on Search:**
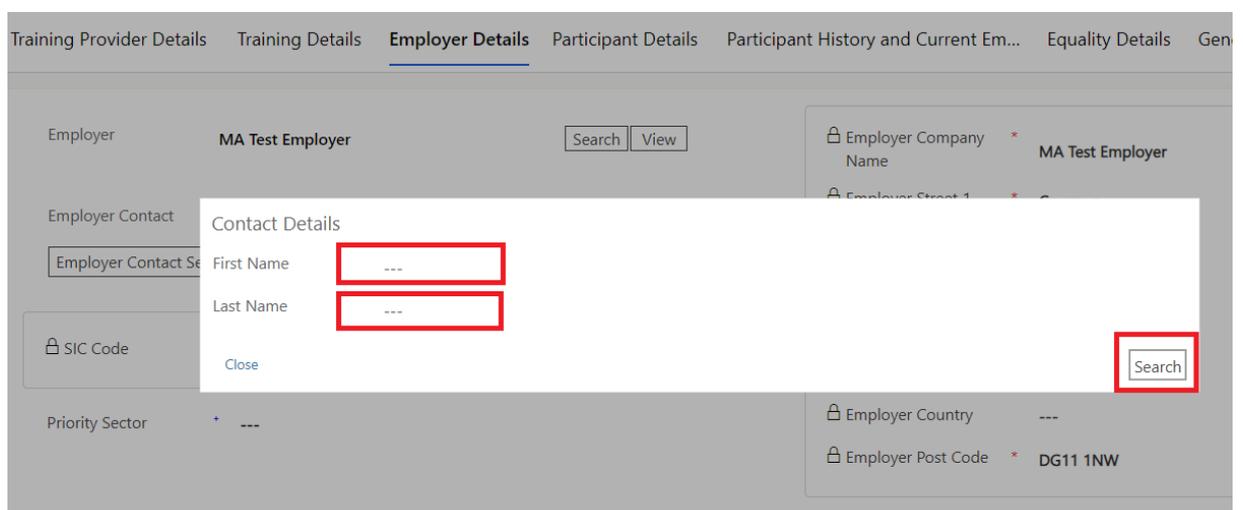
4. **If there is an existing record that matches the name input in the search, it will be returned for you to select:**
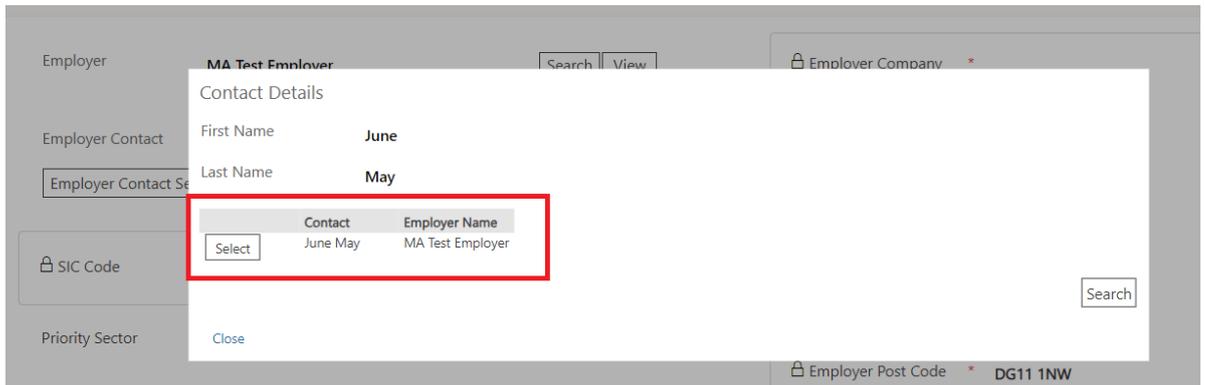
- Ensure the details entered in the search are accurate – spelling errors will stop potential existing results being returned if the details do not match exactly.
- Clicking on "Select" will attach the person to the application / assignment and the search is complete.

5. **If there are no records returned, you are now required to create a new employer contact record. Click on the button "Create New Employer Contact":**
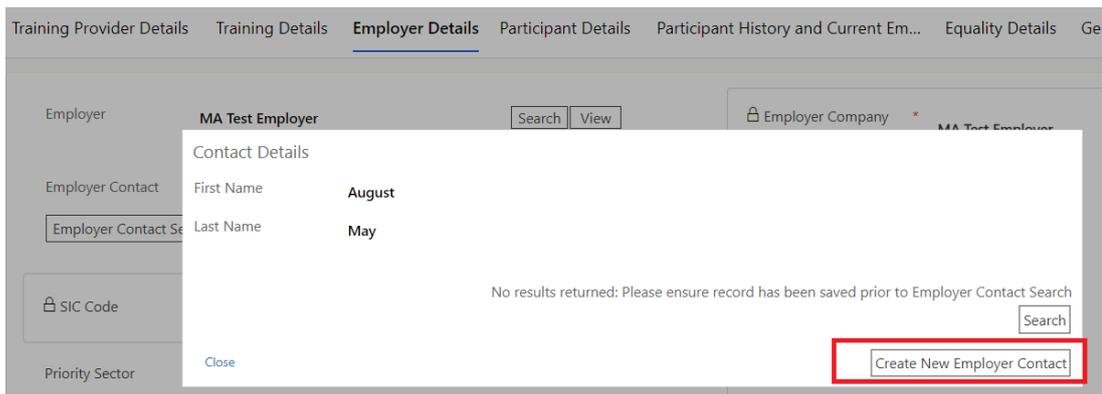
6. **When creating a new employer contact person, the contact information fields will be displayed. One contact number is mandatory (either mobile or landline) and a contact email address must be input. After the accurate details have been input, click on Create:**
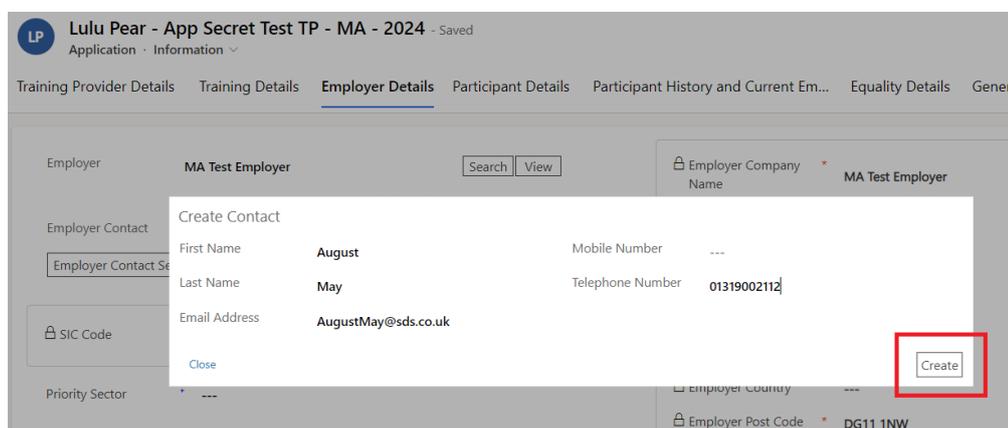
7. **The screen will refresh and a new employer contact record will be created and linked to the employer. The person's name will show in the Employer Contact field:**

- The employer contact will immediately receive an Email Address Validation message from FIPS and they are required to validate their email address.
- You can use the View button to open the employer contact record if required. Data can be amended for the employer contact person in this screen – phone numbers or email address updates can be edited here.

Previously Created Employer Contact Records not Being Returned

➢ If a search is completed for a contact that has **been previously created** and linked to the employer, but no results are returned, ensure the application / assignment is saved then perform the search again. If this does not resolve it, raise a ticket with FIPS Support using the User Requests entity and provide the employer and employer contact details. There should be no duplicate employer contact records created. As an example, if a Learning Provider is adding 3 new start assignments and **all of them have the same employer** and require the same employer contact details, FIPS does not require that the employer contact is **created** for each assignment. The employer contact details should be created underline once and will be displayed in the search results for you to select in any future searches when the employer record / employer contact person is the same. Employer organisation records and employer contact records are linked which means if the employer contact has been attached to the employer previously, it should not need to be created at any point again after the point of input. FIPS Support can investigate any issues and provide guidance.

Contact Details Updates for Existing Employer Contacts

8. **To edit the email address or phone numbers for an employer contact person, use the View button to click into the employer contact record on an application or assignment:**

9. **This will open the employer contact record where these changes can be made. Ensure the form view is set to "Individual Contact" and the Summary tab is clicked into. Email, Business Phone and Mobile Phone fields will then be displayed:**

- Employer Contact names **should not** be amended in this screen if the person has changed completely. If an employer contact person has changed e.g., a change of staff, the name details should not be edited in this screen e.g., amending this record from August May to Brian Smith. Instead, the employer contact search should be performed to check if the details are already in FIPS for the new person. If not, create a new employer contact record for the new contact person's details per the steps in this guide.
- Any changes to contact information for the existing contact can be made from here e.g., amending the mobile phone number. Click on Save on the ribbon bar to save any changes made to the employer contact record. The name details should only be edited in this screen when a person's name has changed for legitimate reasons e.g., through marriage.
- If a change is made to the email address, the email address validation process will begin. The email address validation details for the person can be viewed in the individual record, under the Details tab:

- ➢ **Any changes made in this screen will update any assignments that have that employer contact record attached.**
- ➢ **All other fields in the Details tab should not be edited / updated from employer contact records.**
- ➢ **In an Assignment, use the Update Employer tab to view / access the employer contact details per the steps in this guide.**
- ➢ **In the Individuals entity on the workplace menu, employer contact records will be displayed as well as individual participant / apprentice records. You are also able to access the records from there in order to make amendments per the steps in this guide.**