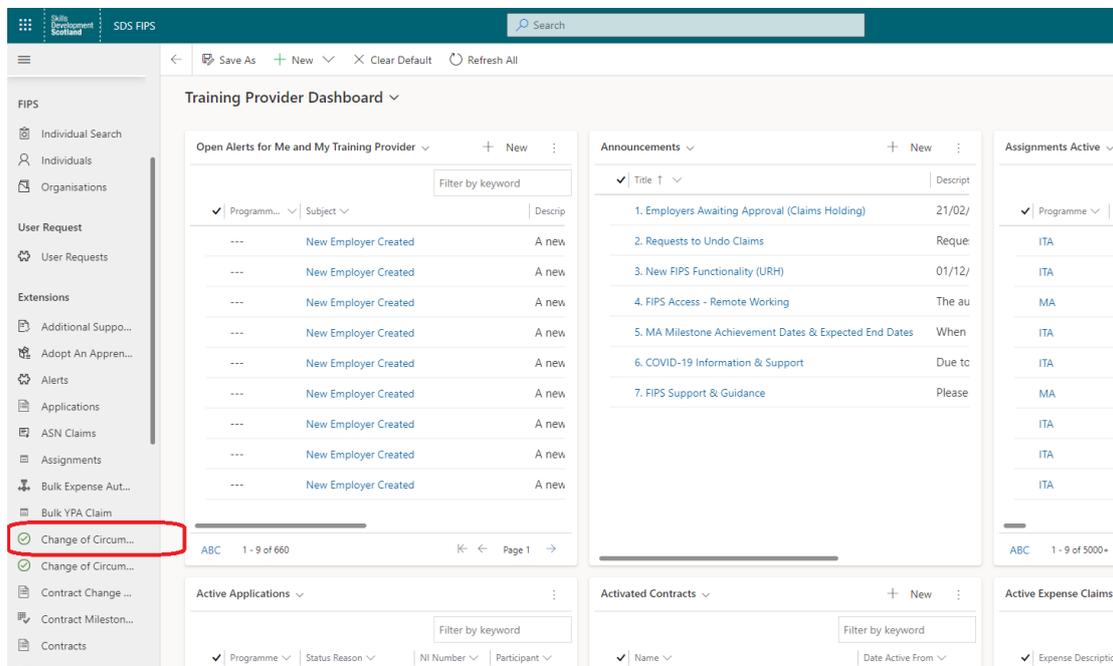


FIPS QUICK START GUIDE

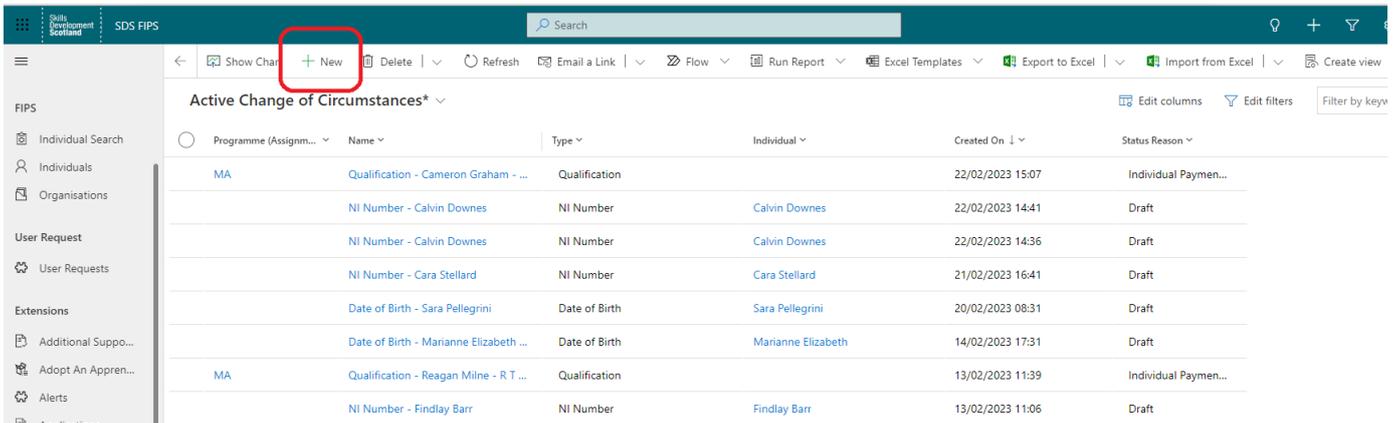
Change of Circumstance – Start Date

The Change of Circumstances (COC) entity on FIPS enables Training Providers to make changes to specific participant information. The following data can be amended via the Change of Circumstance entity: Start Date, Date of Birth, National Insurance Number and Qualification (for engineering frameworks). This guide will provide guidance on how to update the start date of an assignment. COC can only be completed when an Assignment has been generated. COC cannot be submitted when the details exist in draft Assignment or an Application only.

1. To update the Start Date of an assignment for a participant in FIPS, click into the Change of Circumstance entity on the Workplace menu:



2. When the COC view opens, click on “+ New” which will open the Change of Circumstances form:



3. Within the “Type” field under the General tab, select “Start Date” from the list of options:

The screenshot shows the 'New Change of Circumstances' form with the 'General' tab selected. The 'Type' field is a dropdown menu that is currently open, displaying a list of options: '--Select--', 'Date of Birth', 'NI Number', 'Qualification', and 'Start Date'. The 'Start Date' option is highlighted in blue. To the left of the dropdown, the 'Type' and 'Individual' fields are marked with a red asterisk, indicating they are mandatory.

- Any fields marked with a red asterisk are mandatory fields

4. Once the Type field has been populated, additional fields will appear on the right-hand side of the page:

The screenshot shows the 'New Change of Circumstances' form with the 'General' tab selected. The 'Type' field is now populated with 'Start Date'. On the right-hand side of the form, a new section titled 'Change of Start Date' has appeared, containing a 'New Start Date' field with a calendar icon. The 'Type' and 'Assignment' fields on the left are still marked with a red asterisk.

5. The Assignment field should be used to locate the assignment that requires the change. Click into the assignment field and search for the name or use the magnifying glass to search for the participant. Recent Records will be displayed; click on the Recent Records hyperlink to change the results to All Records to perform the search, if required:

The screenshot shows the 'New Change of Circumstances' form with the 'General' tab selected. The 'Assignment' field is active, and a search dropdown menu is open. The dropdown menu contains a search bar, a magnifying glass icon, and a list of recent assignments. The 'All records' option is highlighted in blue. A red 'X' is placed over the '+ New Assignment' button at the bottom of the dropdown menu. A black arrow points from the 'All records' option to the right-hand side of the form.

- In this example, the hyperlink is set to All records. Clicking this text will change the view to Recent Records - “+ New Assignment” should not be used

6. Within the search box, search for the individual using the wildcard function – asterisk (*):

New Change of Circumstances

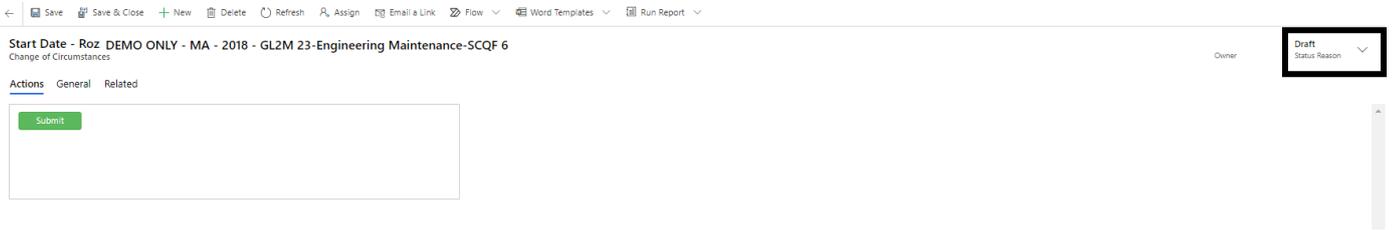
General

- Select the relevant record from the results returned to attach it to the Change of Circumstance form

7. Once selected, the participant current details will appear under the Current Details table. The New Start Date can now be entered into the New Start Date field. Enter the date manually or use the calendar to select:

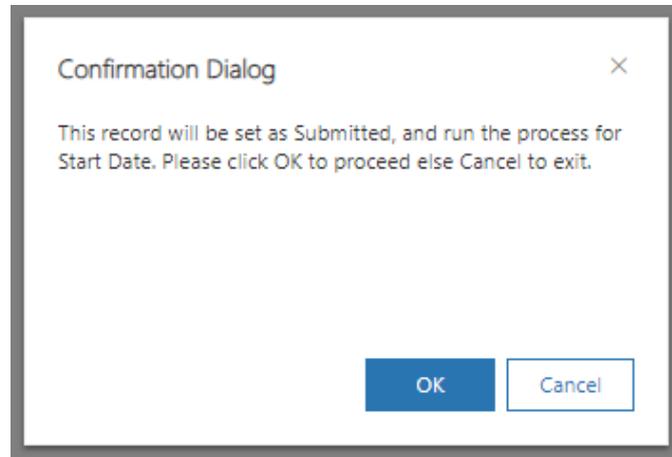
- When a New Start Date has been input, the form will auto save, and the screen will refresh. To return to the draft COC record, use the back arrow. Click this twice:

8. Click into the Draft COC record. The COC will show the status reason as Draft and under the Actions tab a Submit button will be displayed. To submit the Change of Start Date, click on Submit:

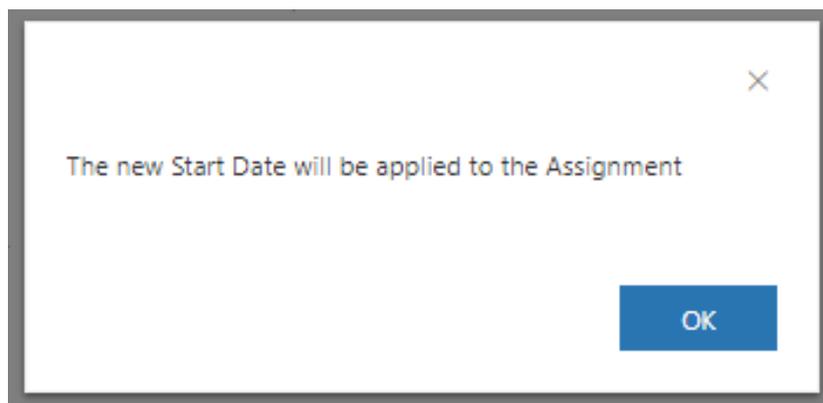


- To leave the start date as is, the COC can be left in Draft status. This will not update the assignment

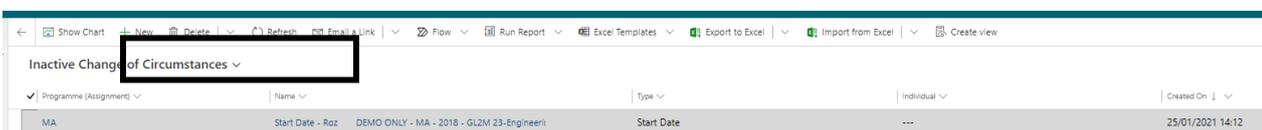
9. A confirmation box will be displayed. Click on OK to submit the details:



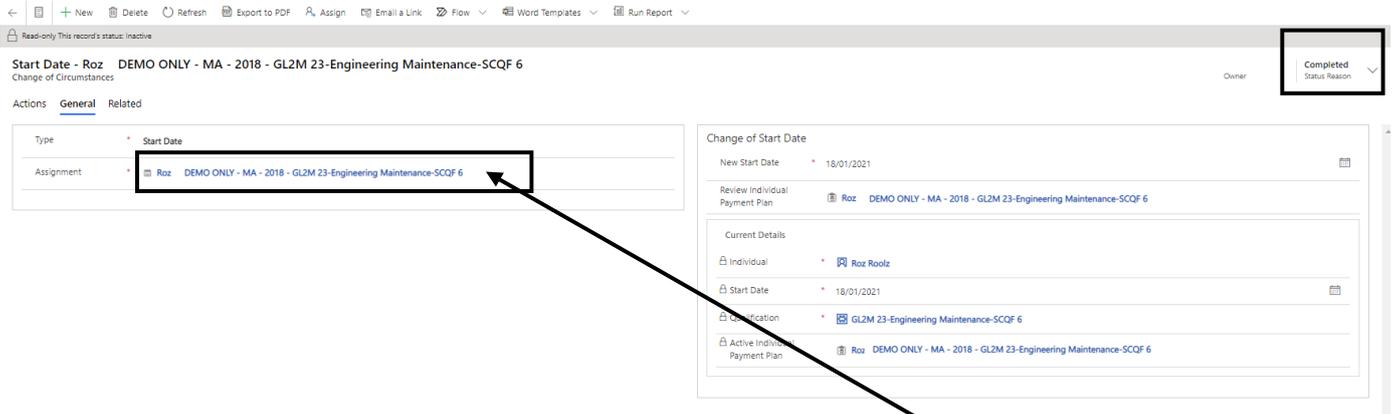
- Clicking on Cancel will leave the COC in draft status and the update will not take place
- Follow the submission boxes – click on OK to continue:



- The change of start date is now complete. The screen will not auto refresh; use the back arrow to return to the COC entity. Select the Inactive COC system view and the completed COC record will be displayed:



- The completed COC can viewed at any point by double clicking to open. The individual's assignment will now display the new Start Date under the Training Details tab and the completed COC will be locked / inactive and no changes can be made:



- The assignment hyperlink can be used to open the participant assignment

There are separate guidance documents that cover the Qualification, NI Number and DOB Change of Circumstance process in detail.