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:

Skills Development Scotland	✓ Search		
=	$\leftarrow {\rm I} \!$		
FIPS	Training Provider Dashboard \sim		
窗 Individual Search 凡 Individuals	Open Alerts for Me and My Training Provider \sim + New :	Announcements - + New :	Assignments Active \vee
Organisations	Filter by keyword	✓ Title ↑ ∨ Descript	
User Request	✓ Programm ∨ Subject ∨ Descrip	1. Employers Awaiting Approval (Claims Holding) 21/02/	✓ Programme ∨
C User Requests	New Employer Created A new	2. Requests to Undo Claims Reque:	ITA
n oser nequests	New Employer Created A new	3. New FIPS Functionality (URH) 01/12/	ITA
Extensions	New Employer Created A new	4. FIPS Access - Remote Working The au	MA
Additional Suppo	New Employer Created A new	5. MA Milestone Achievement Dates & Expected End Dates When	ITA
🛱 🛛 Adopt An Appren	New Employer Created A new	6. COVID-19 Information & Support Due to	ITA
🔀 Alerts	New Employer Created A new	7. FIPS Support & Guidance Please	MA
Applications	New Employer Created A new		174
🖽 ASN Claims	New Employer Created A pair		170
Assignments	New Employer Created A new		
🐺 Bulk Expense Aut	New Employer Created A new		ITA
Bulk YPA Claim			_
Change of Circum Change of Circum	ABC 1-9 of 660 $K \leftarrow$ Page 1 \rightarrow		ABC 1 - 9 of 5000+
Contract Change	Active Applications \sim :	Activated Contracts \checkmark + New :	Active Expense Claims
Ry Contract Mileston	Filter by keyword	Filter by keyword	
Contracts	✓ Programme ∨ Status Reason ∨ NI Number ∨ Participant ∨	✓ Name ∨ Date Active From ∨	✓ Expense Descriptio

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

Skills Development Scotland SDS FIPS	_						8 + 7 ¢
=	← 🖾 Show Char + Nev	v 🛍 Delete 🗸 💍 Refresh	🖾 Email a Link 🗸 🛛 🔊 Flow	∽ 📶 Run Report ∨	🕮 Excel Templates \vee 🛛 🖉 Export to Excel	🗸 🛛 🔩 Import from Excel	✓ ☐ Create view
FIPS	Active Change of Cir	cumstances* ~				🖽 Edit columns 🛛 🍸 Edit	filters Filter by keyw
🖞 Individual Search	O Programme (Assignm ~	Name ~	Type ~	Individual ~	Created On $\downarrow \backsim$	Status Reason ∽	
A Individuals	МА	Qualification - Cameron Graham	Qualification		22/02/2023 15:07	Individual Paymen	
Organisations		NI Number - Calvin Downes	NI Number	Calvin Downes	22/02/2023 14:41	Draft	
User Request		NI Number - Calvin Downes	NI Number	Calvin Downes	22/02/2023 14:36	Draft	
🖒 User Requests		NI Number - Cara Stellard	NI Number	Cara Stellard	21/02/2023 16:41	Draft	
Extensions		Date of Birth - Sara Pellegrini	Date of Birth	Sara Pellegrini	20/02/2023 08:31	Draft	
Additional Suppo		Date of Birth - Marianne Elizabeth	Date of Birth	Marianne Elizabeth	14/02/2023 17:31	Draft	
🛱 🛛 Adopt An Appren	MA	Qualification - Reagan Milne - R T	Qualification		13/02/2023 11:39	Individual Paymen	
Alerts		NI Number - Findlay Barr	NI Number	Findlay Barr	13/02/2023 11:06	Draft	
Applications							

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

← 🖫 Save	🛱 Save & Clo	ose + New 🔊 Flow 🗸
New Change	e of Circu	mstances
General		
Туре	*	
		Select
Individual		Date of Birth
		NI Number
		Qualification

- 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:

P	ew Change of Circumstances		Owner	Draft Status Reason	~
0	eneral				
	Type Start Date	Change of Start Date			^
	Assignment *	New Start Date •			

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:

Linange of Circ	cun	istances	
ype	•	Start Date	Change or Start Date
Assignment	•	Look for Assignment	New Start Date *
		Recent Assignments	All records
		Iolion Training Board) - MA - 2019 - GMTY 23-Roofing Occupations tewis Training Board) - MA - 2019 - GMTW 23-Painting and Decorating (Construction)-SCQF 6	
		V	-
		+ New A nment	

- 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

Туре	*	Start Date	
Assignment	*	*roz*rooiz	م
	_	Assignments	Recent records
		Roz Roolz DEMO ONLY - MA - 2018 - GL2M 23-Engineering Maintenance-SCQF 6	~
		+ New Assignment	Change View

- 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:

New Change of Circumstances				Owner	Draft Status Reason
General					
Type * Start Date	Change of Start Date				
Assignment * 🖀 Roz - DEMO ONLY - MA - 2018 - GL2M 23-Engineering Maintenance-SCQF 6	New Start Date	*			210
		January 2021 🕆 🤟	2021 1		
	Current Details	Su Mo Tu We Th Fr Sa 27 28 29 30 31 1 2	Jan Feb Mar Apr		
	A Individual	3 4 5 6 7 8 9	May Jun Jul Aug		
	🔒 Start Date	10 11 12 13 14 15 16 17 18 19 20 21 22 23	Sep Oct Nov Dec		
	🗄 Qualification	24 23 26 27 28 29 30			
	Active Individual Payment Plan			23-Engineering Maintenance-SCQF 6	

- 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:

E Save
 B Save
 Save

Date - Roz DEMO ONLY - MA - 2018 - GL2M 23-Engineering Maintenance-SCQF 6 of Circumstances		
ions General Related		
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:

Confirmation Dialog	×
This record will be set as Submitted, and run the process Start Date. Please click OK to proceed else Cancel to exit	s for L
OK Cano	el

- 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:

← 🖾 Show Chart + New 🛍 Delete	· · · · · · · · · · · · · · · · · · ·	🎕 Excel Templates \vee 📲 Export to Excel 🗸	🕼 Import from Excel 📔 🗸 🐻 Create view	
Inactive Change of Circumstances	s ~			7
✓ Programme (Assignment) ∨	\mid Name \lor	Type \checkmark	Individual \sim	Created On \downarrow \checkmark
МА	Start Date - Roz DEMO ONLY - MA - 2018 - GL2M 23-Engineerii	Start Date		25/01/2021 14:12
				Page

- 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.