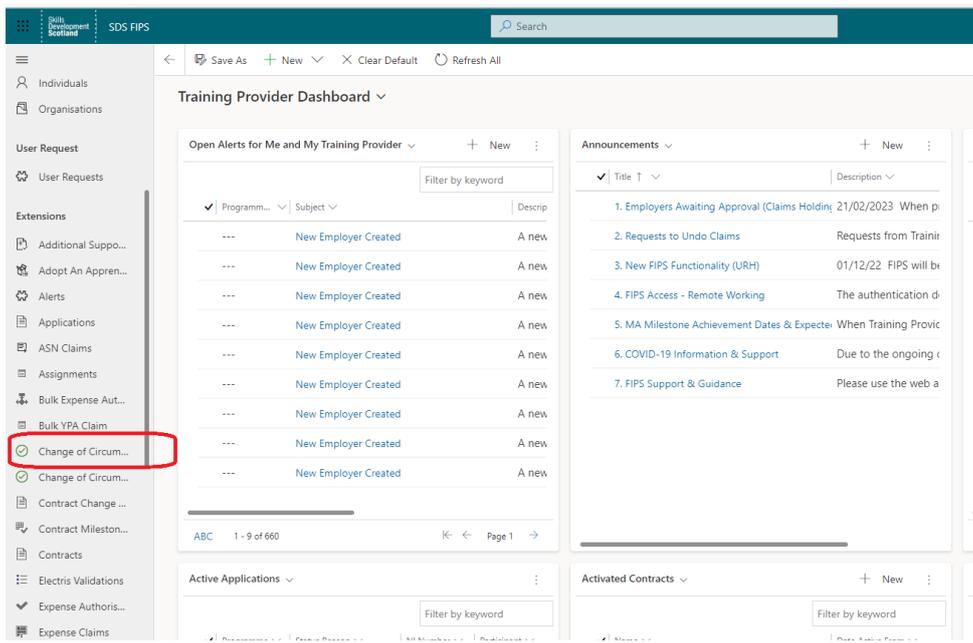


FIPS QUICK START GUIDE

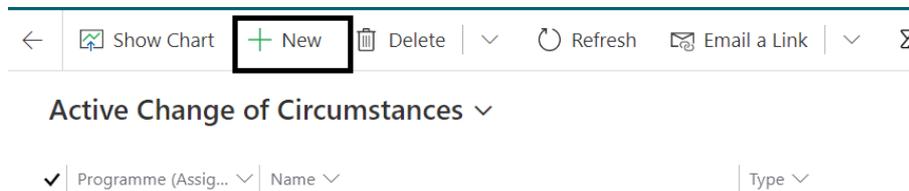
Change of Circumstance – NI Number

The Change of Circumstance (COC) entity on FIPS allows 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 document will provide guidance on how to update a National Insurance Number.

- To update an individual’s NI number on FIPS, select the Change of Circumstance extension from the Workplace menu. This will open the Active Change of Circumstances view:



- Within the Change of Circumstance screen, click on “+ New” which will open the Change of Circumstances form:



3. Within the “Type” field, click into this and select “NI Number” from the list displayed. Any fields displayed with a red asterisk are mandatory and must be completed prior to saving the form:

The screenshot shows the top navigation bar with buttons for 'Save', 'Save & Close', 'New', and 'Flow'. Below this is the title 'New Change of Circumstances' and a sub-section 'General'. The 'Type' field is a dropdown menu currently showing 'NI Number'. A list of options is open below it, including 'Date of Birth', 'NI Number' (highlighted in blue), 'Qualification', and 'Start Date'. The 'Individual' field below it has a red asterisk and is currently empty.

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

This screenshot shows the 'General' section of the form. The 'Type' dropdown is set to 'NI Number'. The 'Individual' field has a red asterisk and contains '---'. To the right, a new section titled 'Change of National Insurance Number' has appeared, containing a field for 'New National Insurance Number' with a red asterisk and '---' as a placeholder.

5. Click into the Individual field and search for the required participant. Within the search box, search for the individual using the wild card function (*Firstname*Surname*) or the Recent Records / All Records function:

New Change of Circumstances

General

This screenshot shows the 'Individual' field with a search dropdown open. The search bar contains 'Look for Individual'. Below the search bar is a list of individuals with their dates of birth and locations: 15/08/1999 DUNDEE, 11/07/1992 DUNDEE, 09/01/1991 GLASGOW, and 04/10/1973 MUSSELBURGH. A 'Recent records' button is highlighted with a red box and an arrow. At the bottom of the dropdown are '+ New Individual' and 'Change View' options.

6. Once a participant has been selected, the individual’s current details will be displayed on the right side of the screen:

The screenshot shows two panels. The left panel, titled 'General', has a 'Type' dropdown set to 'Individual' and an 'NI Number' field containing 'Bobby Test'. The right panel, titled 'Change of National Insurance Number', has a 'New National Insurance Number' field with three dashes '---'. Below it, a 'Current Details' section lists: First Name 'Bobby', Last Name 'Test', Date of Birth '01/01/2004', and NI Number 'AB123007C'.

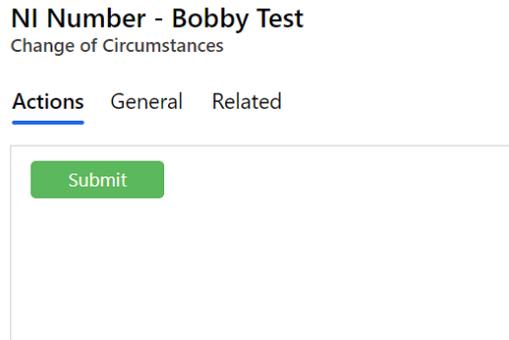
7. To update the National Insurance Number, click into the “New National Insurance Number” field and enter the new NI number into the free text box. This field will only accept NI numbers input using the correct format:

This is a close-up of the 'Change of National Insurance Number' form. The 'New National Insurance Number' field is highlighted, showing the text 'J1' entered. Below it, the 'Current Details' section is partially visible.

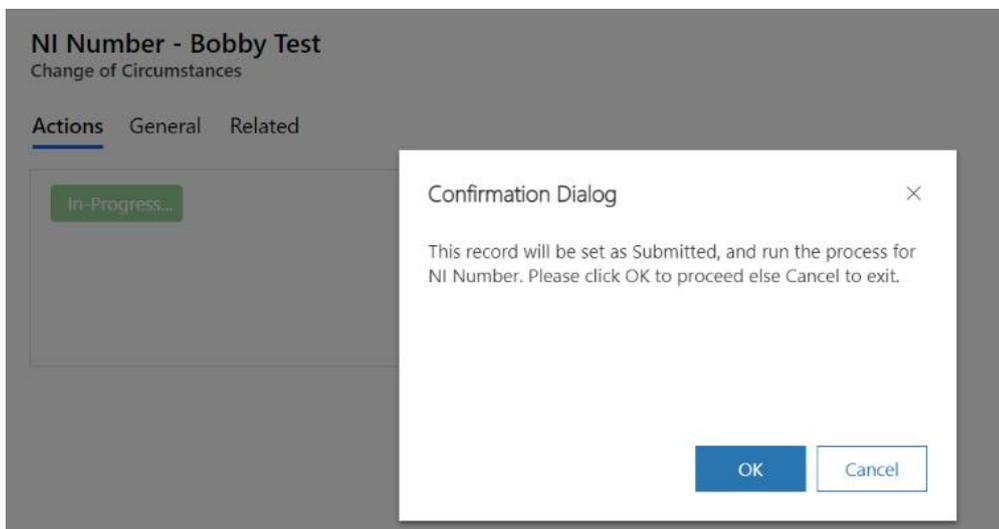
8. When accurate details have been entered, the COC the form will auto save, and the screen will refresh. To return to the draft COC record, use the back arrow. Click this twice:

The screenshot shows the SDS FIPS interface. At the top, there is a navigation bar with 'Skills Development Scotland' and 'SDS FIPS' labels, and a search box. Below the navigation bar is a toolbar with buttons for 'Save', 'Save & Close', 'New', and 'Flow'. A back arrow button is circled in red. The main content area shows a 'New Change of Circumstances' form with a 'General' tab. The form has 'Type' and 'Individual' dropdowns, both currently set to '---'.

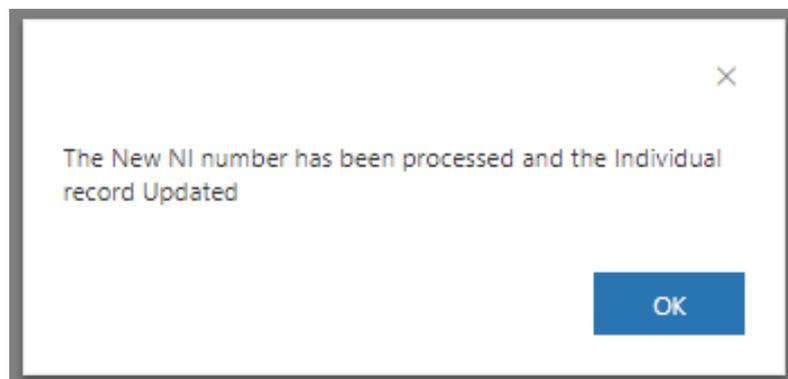
9. Click into the Draft COC record. The COC can now be submitted by using the Submit button under the Actions tab:



10. When Submit is clicked, a confirmation box will be displayed. Click OK to submit the change to FIPS:



- Clicking on Cancel will not submit the change and the details will remain in draft; the NI number will not be updated
- Once complete, the confirmation message below will be displayed. Click OK to finish:



11. The individual contact record and the related assignment(s) will be updated with the new NI number and the Change of Circumstance will show as status “Completed”:

NI Number - Bobby Test
Change of Circumstances

Owner: [Redacted] | Status Reason: Completed

Actions: General | Related

Type	NI Number
Individual	Bobby Test

Change of National Insurance Number

New National Insurance Number: AB123007C

Current Details

First Name	Bobby
Last Name	Test
Date of Birth	01/01/2004
NI Number	AB123007C

- The COC record will now be displayed within the Inactive Change of Circumstance view within the Change of Circumstance entity:

Inactive Change of Circumstances

Programme (Assignment)	Name	Type	Individual
---	NI Number - Roz Roolz	NI Number	Roz Roolz
---	Date of Birth - Sear	Date of Birth	Sear
MA	Qualification - Leighann MA - 2020 - GP7F 4	Qualification	---
MA	Start Date - Roz GL2M 23-Engineerin	Start Date	---
MA	Start Date - Amy - GH5W 23-Social Service	Start Date	---
---	NI Number - Bobby Test	NI Number	Bobby Test

- If the NI number you are attempting to update to has been previously registered on FIPS, a COC cannot be performed. An error message will be returned and the process will not be completed. In these instances, a ticket should be raised with FIPS Support and the records can be merged which will update the NI number for the participant.

If the individual has other / previous assignments on FIPS with a different Training Provider, a **Change of Circumstance Actions** record will be generated. This can be viewed within the Change of Circumstance Actions entity on the Workplace menu. The other Training Provider must accept the update made by reviewing the details and accepting the update before the COC created by the Training Provider will show as Completed status. Any related alerts will be displayed on the Dashboard.