FIPS QUICK START GUIDE

Change of Circumstance – Date of Birth

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 guide will provide details on how to update a Date of Birth. Changes to DOB date can only be made when there is an active assignment for a participant; it cannot be processed when there is a Draft Assignment or Application.

1. From the Workplace extension menu, navigate to the Change of Circumstances entity:

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2. Within the COC screen, the view will default to Active Change of Circumstances. Click on "+ New" which will open the Change of Circumstances form:





3. Type and Individual are mandatory fields – mandatory fields are depicted with a red asterisk (*). Within the "Type" field, click into this and select "Date of Birth" from the list:



4. Once this has been selected, additional fields will appear on the right-hand side of the page:

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New Change of Circumstances		Owner	Draft Status Reason
General			
Type * Date of Birth	Change of Date of Birth		
Individual *	New Date of Birth *		Ī
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	Parent Change of Circumstances Action		

5. Click into the Individual field and use the look up icon to expand the drop-down list. Click on Recent records to display a list of recently viewed individuals. Alternatively, search using the box by typing the participant's name:

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Туре	* Date of Birth	
Individual	* Look for Individual	\$
	Individuals	Recent record:
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	11/07/1992 DUNDEE	\sim
	09/01/1991 GLASGOW	\sim
	04/10/1973	\checkmark
	+ New Individual	Change View



6. Select the record from the results. In this example, "Test pers" has been entered into the box and the result returned is the individual "Test Person":

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7. Once selected, the current details will be displayed on the right-hand side of the screen:

Change of Circumstances		Owner Status Reason
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	Current Details	
	☐ First Name * Test	/
	A Last Name * Person	
	△ Date of Birth 05/05/2000	
	A NI Number	
	Date of Birth Process Trigger	
	Parent Change of Circumstances Action	/
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- To update the Date of Birth, click into the "New Date of Birth" field and enter the correct date of birth in the required format DD/MM/YYYY or use the calendar option at the right of the field to select the date. Once the new DOB has been selected, the form will auto save and the page will refresh.



8. To return to the draft COC record, use the back arrow. Click this twice:



9. In the draft record, the COC can now be submitted by using the Submit button under the Actions tab:

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A Individual			
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User Request	Change of Circumstances	Owner	Status Reason
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10. A confirmation popup will be displayed that states that the record will be set to submitted and FIPS will update the DOB details for the individual. Click Next to proceed. At this stage, Cancel can be selected which will cancel the COC request and the details will not be changed:





11. If the change does not impact the training category and there is no change required to the funding, the following message will appear, and the date of birth will be updated. The status of the submitted Change of Circumstance will now show as "Completed" which completes the COC DOB action.



Changes to DOB that impacts Training Category / Funding

1. If the change of Date of Birth does impact the funding for the individual, e.g., changing from 16-19 funding to 20-24 age group, the popup box will display the below message. Select Proceed to submit the change or Cancel to leave the COC as a draft:

Confirmation ×	:
CoCDoB	
The change of date of birth will affect the Active Individual Payment Plan, please select Proceed to continue or Cancel to stop the operation. If you choose to proceed, the generated Payment Claims will be accessible from within the CoC record.)
Proceed Cancel	

2. The screen will refresh and the status will show as "Individual Payment Plan Review". Any notifications will be displayed along the ribbon banner. Click to expend to view the details:

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	Submit for	Approval											



3. When the COC is at Individual Payment Plan Review status, FIPS is performing checks against the contracted volumes for the Training Provider contract. It is only when these checks are complete that the new Individual Payment Plan is displayed in the Change of Circumstance form. This will be blank (shown below) until that process is complete:

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Individual Payment Plan Review	A First Name
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4. When the new Individual Payment Plan is displayed it should be reviewed to ensure it is accurate:

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- Claims will show as Pending until the COC has been approved by SDS.



5. When the IPP is displayed, the COC can now be submitted for Approval. Click into the Actions tab to submit. Follow the submission boxes to submit the COC for approval:

I	Confirmation ×
l	SubmitForApproval
	Are you sure you would like to Submit this record for Approval? By accepting this action, the status will be set to Submitted and assigned to SIA team. Please click Next to proceed else click Cancel to exit.
	Next Cancel

The submitted COC will now be reviewed by SDS. It can be approved or rejected at this stage. Any action taken with the record will result in an alert being generated on the Training Provider Dashboard. The COC will be displayed in the Active Change of Circumstances view with the status "Submitted" until this has been approved / rejected. Once approved or rejected, the COC record will be automatically added to the Inactive Change of Circumstances system view.