

# FIPS QUICK START GUIDE

## Entering & Updating Leaving Details

This guide will cover how to enter leaving details on an assignment or make changes to leaving details previously input. Leaving details must be added to an assignment as soon as a participant is no longer in training. Claims can be processed after leaving details have been entered when the assignment is at Leaver Active status. For Leaver Archived records; claims cannot be processed. The process will be demonstrated for an MA assignment; however, the process is the same across all programmes however the leaving codes may be different as this data is programme specific.



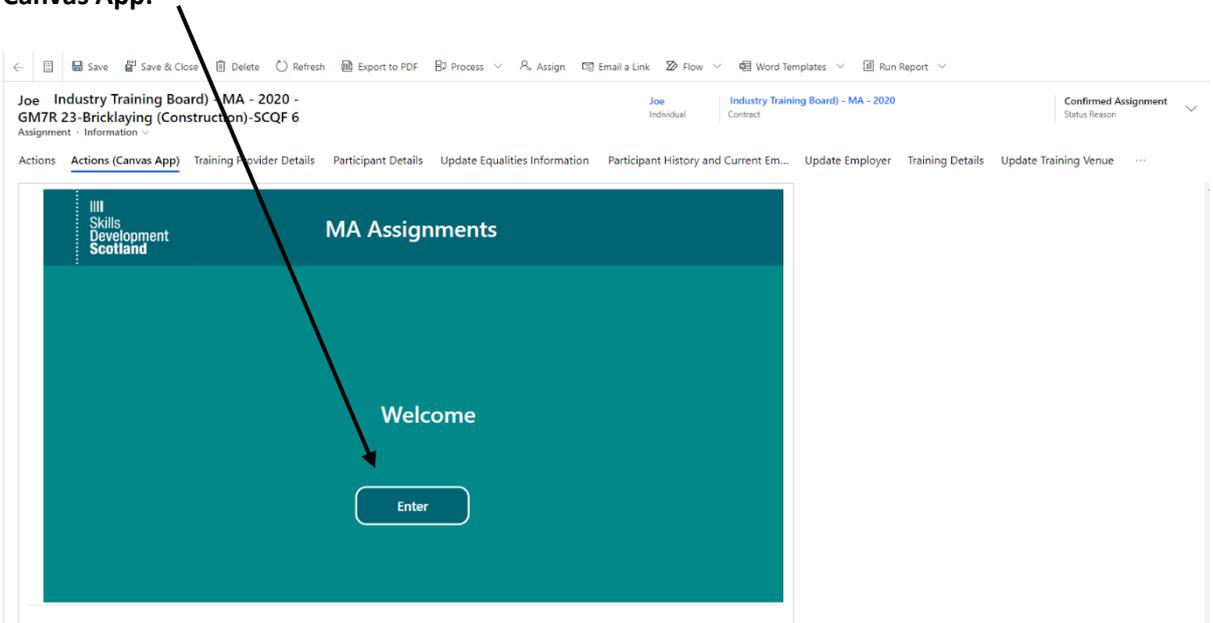
There is a video that covers this process – click the play button to view this.

1. To add leaving details to an assignment go to Workplace, Assignments and select the assignment that leaving details are to be entered for. Leaving details cannot be processed for multiple records in a single action and must be input on an individual basis.
2. Double click on the white part of the row to open the assignment. Clicking on a hyperlink (blue text) will open a different screen in FIPS (either a different entity or reference table):

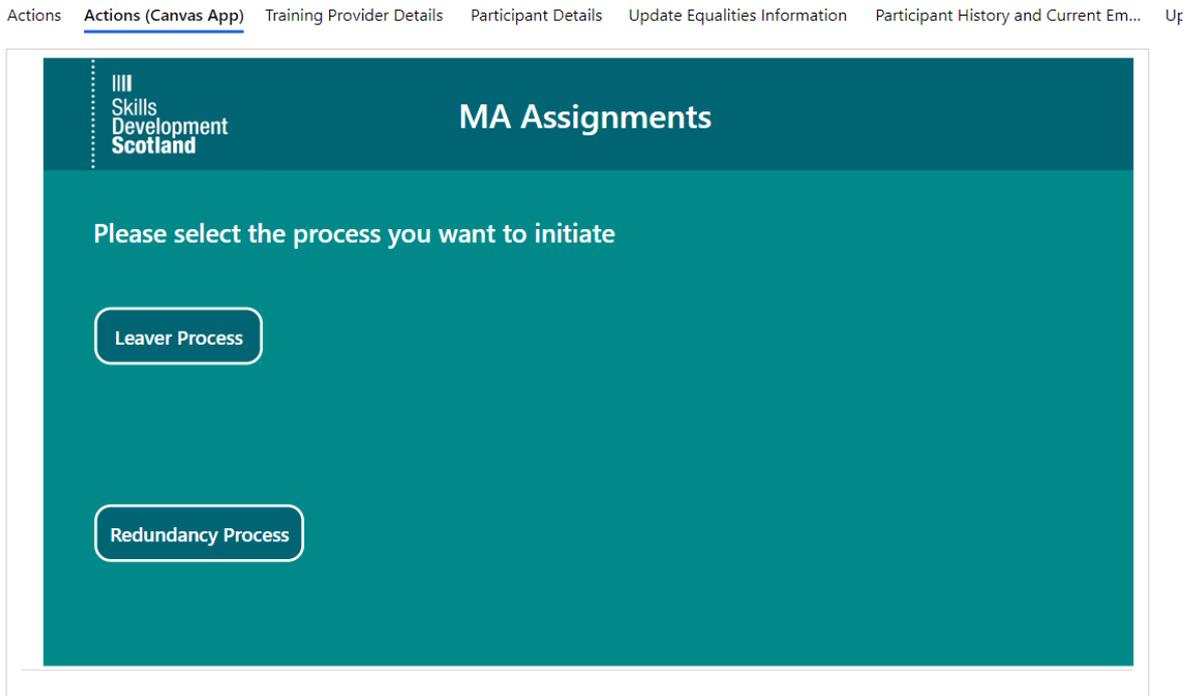
Program...	Status Reason	Preferred ...	Assignme...	Individual
ITA	Unconfirmed Assignment	Email		<a href="#">William Mathison</a>
ITA	Unconfirmed Assignment	Email		<a href="#">Theresa/ Rebecca</a>
MA	Unconfirmed Assignment	SMS	<a href="#">New Start</a>	<a href="#">Molly Wright</a>
WR	Unconfirmed Assignment	Email		<a href="#">Rebecca Battersby-Campbell</a>
MA	Unconfirmed Assignment	SMS	<a href="#">New Start</a>	<a href="#">Jakub McDonald</a>
ITA	Unconfirmed Assignment	Email		<a href="#">David Ijeoma</a>
MA	Unconfirmed Assignment	SMS	<a href="#">New Start</a>	<a href="#">Leigh Fraser</a>
WR	Manual Approval Required	Email		<a href="#">Amy Docherty</a>
MA	Confirmed Assignment	SMS	<a href="#">New Start</a>	<a href="#">Jacqueson McEwan</a>
WR	Manual Approval Required	Email		<a href="#">Ugochi Ihuoma</a>

Hyperlinks are blue links within FIPS.

- When the assignment opens, click into the Actions (Canvas App) tab. It may take a few seconds for the Canvas App to load. Click on Enter to display the functions held within the Canvas App:



- Depending on the programme, the functions within the Canvas App will differ. Click on the Leaver Process button to open the leaving details section. If the individual has been made redundant, a redundancy date can be entered using the Redundancy Process button. This does not add leaving details in full to the record (MA & GA only):



5. When Leaver Process is selected, the Canvas App will display further selection boxes. The parent leaver code must be selected – either Early Leaver or Leaver (Achieved):

Actions Actions (Canvas App) Training Provider Details Participant Details Update Equalities Information Participant History and Current Em...

Skills Development Scotland

## MA Assignments

Please select the appropriate Exit Process you wish to use for Assignment:  
Industry Training Board) -  
MA - 2020 - GM7R 23-Bricklaying (Construction)-SCQF 6

Early Leaver Leaver (Achieved)

6. After a parent code has been selected, the form will reveal leaving detail drop-down menus – select the relevant information and input the leaving date:

Actions Actions (Canvas App) Training Provider Details Participant Details Update Equalities Information

Skills Development Scotland

## MA Assignments

\* Please select a Top Level Leaver Code for Individual: Joe

Please select a value

\* Please select the Leaver Code

Please select a value

\* Please supply Leaving Date

31/12/2001

- **When the fields above have been completed, click on Next:**

Actions Actions (Canvas App) Training Provider Details Participant Details Update Equalities Information Participant History and Current Em... Update

(Information above is for demonstration purposes only; input the relevant details for the participant)

7. Click on Next and additional radio buttons will be displayed. Select the relevant option for the popup “Please advise if the leaver achieved units prior to leaving” then click on Submit.

The assignment status will be updated to show as Leaver (Active). If changes are required prior to submission, use the back arrow in the Canvas App to return to the previous screen(s). To cancel the process in full, click out of the Canvas App by clicking on the Home button on the Workplace Menu which will stop the process.

8. When the changes have been recorded, a message will be displayed within the Canvas App to confirm this:

Britney Spears - DEMO ONLY - MA - 2018 - G9FJ 23-Housing-SCQF 7  
Assignment · Information ▾

Britney Jean Spears Individual DEMO ONLY - MA - 2018 Contract Leaver (active) Status Reason ▾

Actions Actions (Canvas App) Training Provider Details Participant Details Update Equalities Information Participant History and Current Em... Update Employer Training Details Update Training Venue ...

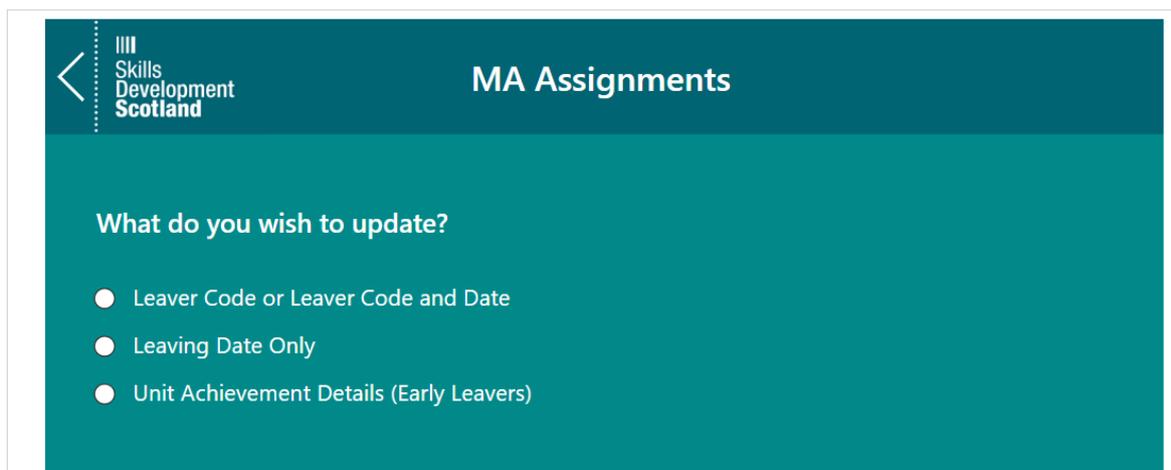
- “A new leaver date has been updated successfully”

## Amending Leaving Details

To make changes to leaving details that were input previously, go into the participant assignment, and follow the steps above to access the Canvas App. Changes can only be made to Leaver assignments.

9. Within the Canvas App, click on the Leaver Process button. The below options will be displayed. Select the relevant option from the list to update the information:

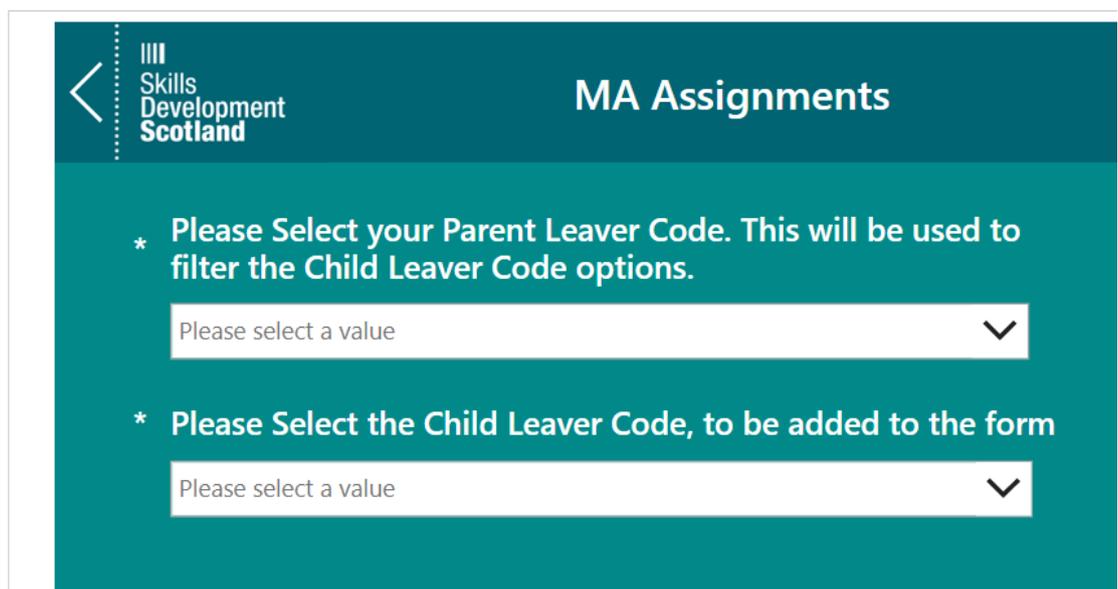
Actions Actions (Canvas App) Training Provider Details Participant Details Update Equalities Information Participant History and Current Em...



The screenshot shows the 'MA Assignments' screen in the Canvas App. At the top left is the Skills Development Scotland logo. The main heading is 'MA Assignments'. Below this, the question 'What do you wish to update?' is displayed. There are three radio button options:

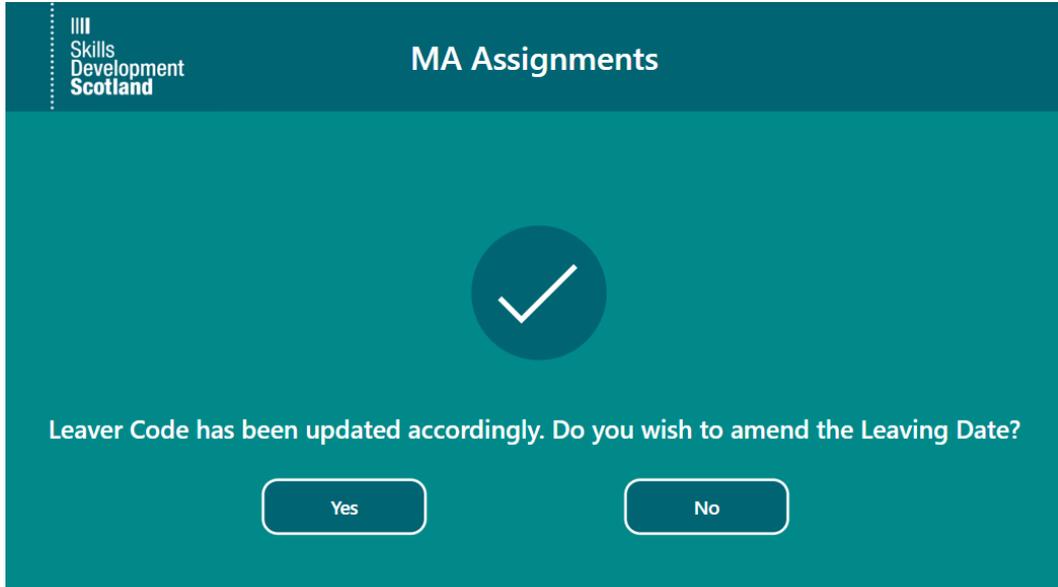
- Leaver Code or Leaver Code and Date
- Leaving Date Only
- Unit Achievement Details (Early Leavers)

- Once a selection has been made, a Next button will be displayed. Click on this to amend the information. Use the dropdowns to select the updated leaving detail information. Once the fields have been selected, a Submit button will be displayed:



The screenshot shows the 'MA Assignments' screen with two dropdown menus. The first dropdown is labeled with an asterisk and the text: '\* Please Select your Parent Leaver Code. This will be used to filter the Child Leaver Code options.' The second dropdown is also labeled with an asterisk and the text: '\* Please Select the Child Leaver Code, to be added to the form'. Both dropdowns currently show 'Please select a value' and a downward arrow.

**10. Once saved, a confirmation message will be displayed in the Canvas App:**



The leaving code information will be displayed under the Leavers tab of the assignment:

Actions   Actions (Canvas App)   Training Provider Details   Participant Details   Update Equalities Information   Participant History and Current Em...   Update Employer   Training Details   Leavers

Actual End Date	04/01/2021	
Parent Leaver Code	Education and Training	
Leaver Code	Other training	
Early Leaver	No	
Date Leaver Notification Received	18/01/2021	
Units achieved prior to leaving	---	
Achieved units resulted (if applicable)	---	
Reason achieved units not resulted (if applicable)	---	
Achievement information completed	No	

Redundancy

Made Redundant On    ---

**11. If leaving details are required to be removed entirely from an assignment, submit a User Request via the User Requests entity (URH) and the FIPS Support Team can action this. To change Leaver Archived records back to Leaver Active status, Training Providers should contact their SIA/DDE at SDS for approval then raise a ticket with FIPS Support attaching proof of approval for this to be actioned.**

When leaving details have been entered, Outcome claims can be made. Outcome claims cannot be submitted for assignments that are not at Leaver status.