

# FIPS QUICK START GUIDE

## Searching for Employers in FIPS

This guide provides a detailed demonstration of how to search for employers in FIPS.

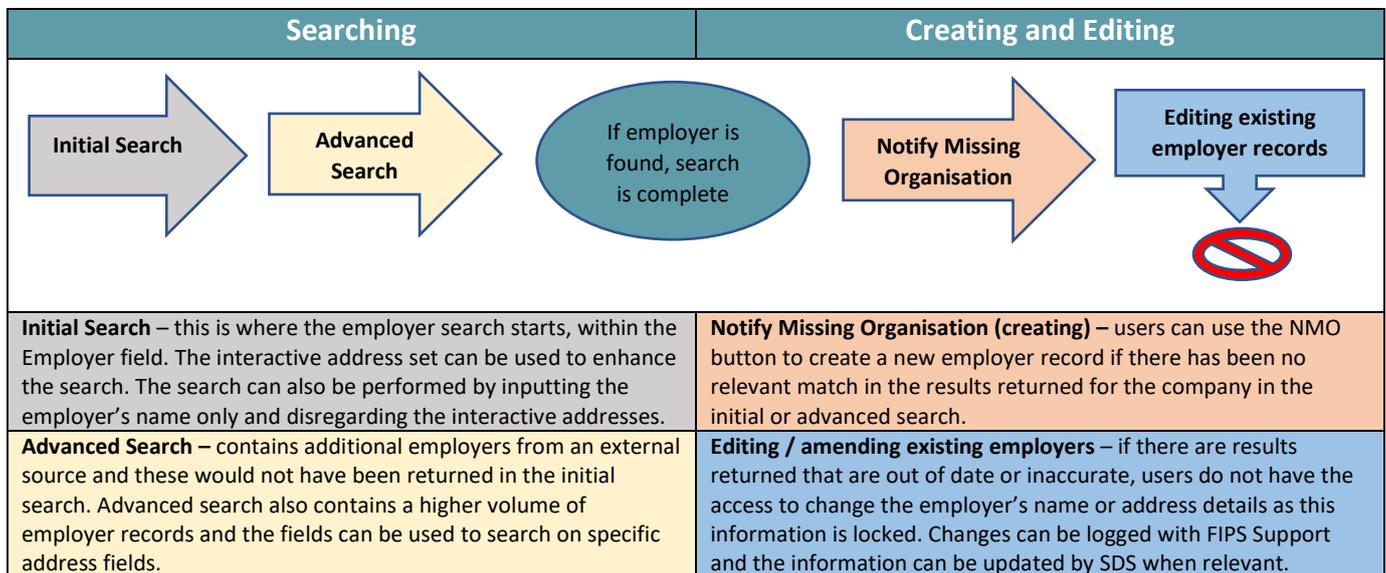
The document includes embedded video tutorials for each part of the employer search to break down each section in detail. Read the entire document - by searching following the methods demonstrated, this will ensure that existing employer records are returned in the search results for you to select. The final section covers how to create new employer records for the occasional instances when the employer required is not returned in the search results. In these cases, the Notify Missing Organisation option should be used.

The employer search in FIPS is made up of two separate search areas - an **initial search** and an **advanced search**. The initial search must be performed first. If no match is returned, the advanced search can then be used. If there are suitable results returned in the initial search, there is no requirement to open the advanced search.

To begin the search for an employer in FIPS, the **Employer** field in a participant application or assignment is where the search gets performed. The initial search can be done by inputting the company name only and clicking search or by using the **interactive search results** which display interactive address listings from the Royal Mail database. Both methods can be used in the initial search to find employer records that currently exist in FIPS.

The advanced search provides additional employer records from an external database from out with FIPS; this means there may be a result displayed for the company required in the advanced search that was not returned in the initial search results.

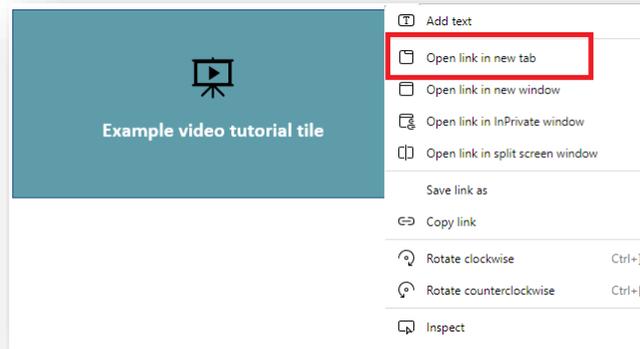
The advanced search is also where employer records can be manually created by users after a search has been performed and no matching result is found. Employers can be created using the Notifying Missing Organisation button.



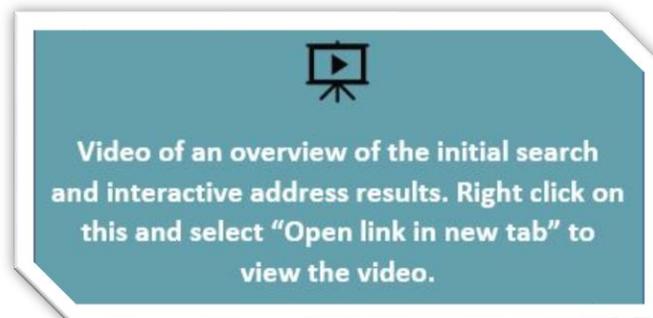
- By following this guide, FIPS users should only need to **create** new organisations in small numbers as the majority of employers will be returned in the search – there are multiple methods to searching and this guide provides demonstration videos on how best to do this.

Initial Interactive Search	Initial Search	Advanced Search	Create Employer
Search by inputting the employer's name and selecting an interactive address from the employer search field, if displayed	Initial search can also be performed by disregarding the interactive address list and inputting the company name only	If no relevant results are returned in the initial search, the Advanced Search can be used to search an external data source to find the employer	If no relevant employer has been returned in the initial or advanced search, an employer can be created using the Notify Missing Organisation option

Full guidance on how to perform the employer search is detailed in the tutorial videos embedded within this guide. Please ensure you view each video in full. Right click on the icons and choose "Open link in new tab" to view the videos in detail:



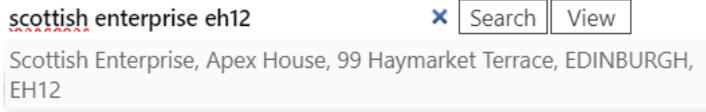
The video linked below contains an introduction to the employer search:



- Interactive results are Royal Mail records - not employers in FIPS. The company *may* exist in FIPS; if so, it will be displayed in the search results when the search is performed.
- Interactive addresses can be found by including any part of the address e.g., town, street name or postcode. If a match is displayed for the company required, click on this then click Search.
- If there is no interactive address result for the company required, search using the employer's name only.
- Both methods of searching in the Initial Search are demonstrated in the video above and both are valid ways to search.
- If changing the employer in an assignment, the current employer will be displayed in the "employer" field. Click on the "X" to remove this to begin the search.

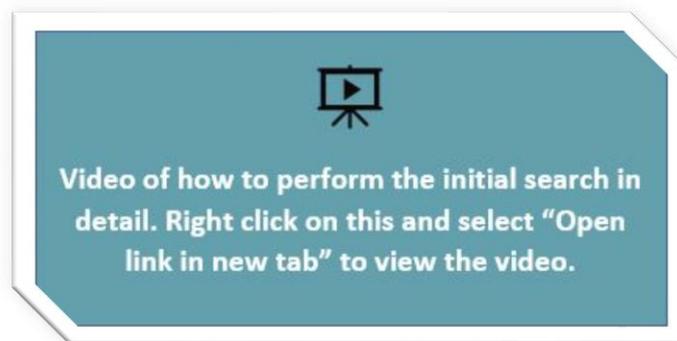
Select the interactive address if a relevant address is displayed then click on Search to search the FIPS database for any relevant matches for that employer information. The interactive results displayed are address records provided by the Royal Mail address finder. These are not FIPS employer records and they cannot be edited or amended by Skills Development Scotland.

This table provides examples of what details can be input in the employer search field in order to display interactive address results:

Employer		<b>Employer name and part of town – “Glasg” and the interactive result displays 1 Glasgow address</b>
Employer		<b>Employer name and part of the postcode – the interactive results show a match for this</b>
Employer		<b>Employer name and the street name – a matching result is displayed in the interactive address set</b>

## Initial Search

The video below demonstrates the initial search in detail:



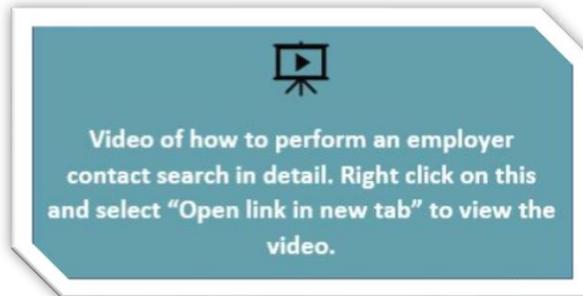
- The initial search video demonstrates how to use both search methods when performing an initial search – selecting an interactive address or by searching on employer name only. Both search methods are suitable when using the initial search.

### INITIAL SEARCH - POINTS TO NOTE

- ✓ Search using the most well-known name for the employer. Do not include department names etc. e.g., do not search “Blackburn Council – Estates Department”. Only the official name should be used e.g., “Blackburn Council”.
- ✓ If no result is displayed in the interactive results, ensure the details input are accurate and amend if required or search using some other part of the address details – this data is regularly updated by Royal Mail and therefore should display most addresses.
- ✓ If an interactive result is clicked, the “Employer” field will only display the **organisation name**. It will not display the address details; however, the search criteria will be updated to include the address information.
- ✓ Interactive results should be selected regardless of the formatting or spacing of the employer’s name – “B&Q” versus “B and Q Plc” - if the interactive result displays the name, regardless of formatting this should be clicked in order to search FIPS.

FIPS users are unable to edit employer names or addresses of existing employer records in FIPS. If there is an employer returned in the search results that generally matches the company required but some of the details displayed are incorrect or no longer accurate, raise a ticket in the User Requests entity in FIPS for this information to be manually amended by FIPS Support. Users should select the employer to attach it to the application or assignment in the interim and when it has been amended by FIPS Support, the changes will show on any linked applications or assignments.

After an employer has been attached to an application or assignment, the **Employer Contact** search must now be performed. A detailed video demonstration of how to perform the employer contact search is available below:



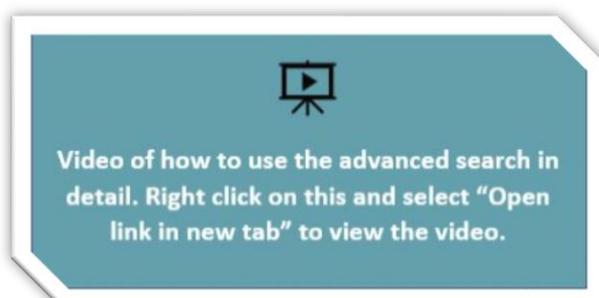
Employer contacts are linked to employer records – if duplicate employers are created in error due to not performing the employer search correctly, any previous employer contact records for the person required will **not** be displayed in the employer contact search results. This will mean the employer contact details required will need to be created again which will create a duplicate record for the employer contact person and the email address validation will commence again. By searching for the employer per the guidance, this will reduce the employer contacts that need to be **created** as any previously created employer contacts will be returned in the employer contact search results.

### **Advanced Search**

The advanced search is where employers can be searched for after the initial search has been performed and there have been no relevant results returned. The advanced search also provides additional employers from an external data source which means the employer required may be returned in the advanced search after not being returned in the initial search.

FIPS users must ensure that the initial search for the employer has been done using the Employer field on the application or assignment and the results displayed reviewed thoroughly for any matches. If there is no match returned for the company required, the Advanced Search can be opened.

**The video below provides a demonstration of how to use the Advanced Search:**



## ADVANCED SEARCH - POINTS TO NOTE

- ✓ Initial search must be performed before the advanced search.
- ✓ Advanced search is a search tool; employers can be found by searching using various search criteria.
- ✓ Advanced search contains additional employer records from out with FIPS – these are provided from an external database.
- ✓ If an employer was selected using the address lookup in the postcode field, the organisation name may be pre-populated with the legal trading name. For example, if the employer required is “Sainsbury’s”, the legal trading name may show in the interactive results as “Sainsbury’s Supermarkets Ltd”.
- ✓ Users are able to edit the name in the Organisation field of the advanced search to “Sainsbury’s”. No other fields should be changed unless the details are not accurate – e.g., address line 1 is incorrect. For example, amending street line 1 from 120B to 120B-122B, this can be edited in the fields in the advanced search window. Town / City and Postcode and other fields should be left as is as this information has been supplied via Royal Mail and is therefore formatted correctly.
- ✓ When the search results are displayed, the Organisation field and the Trading Name field may show different employer names. If either field is a match for the company required, select this result from the list to complete the search.

## Editing Employer Records

If a relevant employer is displayed in either the initial search or advanced search that matches the information you require but some of the information is inaccurate or needs updated, the employer should be selected and attached to the application or assignment to complete the employer search. Once it has been selected, a user support ticket should be raised with FIPS Support within the **User Request entity** for the details to be manually updated.

This should be done in instances where the address is not accurate; either the street address is incomplete or the postcode has a typo. If the employer’s name needs to be changed slightly this can also be amended by FIPS Support. This process should be followed in order to maintain the existing employer records in FIPS and ensure records are kept up to date. New (duplicate) employer records **should not** be created in instances where there is a relevant match that requires an update to the details in this way.

**When there is no relevant result or in instances where the company has changed name completely or moved to an entirely new area or premises and this information is not returned in the search, new records can be created using the Notify Missing Organisation option.**

It is the responsibility of providers to request that existing employers are amended by FIPS Support when required.

Employer details in FIPS should reflect the participant paperwork / training agreement for compliance purposes. However, providers can select an Organisation from the results if there is a reasonable assumption that the FIPS employer record and the employer listed within the paperwork are the same company, at the same location. Any **minor** differences between the address details or Registered Organisation Name will still be considered compliant. The Notify Missing Organisation option should not be used to create new / duplicate employer records in these instances.

The table below provides example scenarios and what action should be taken:

Example scenario	Action to be taken by user	Additional info
Employer is listed in search results as Harvey James Clothing Supplies Ltd. They changed their name to HJ Clothing Supplies.	In this instance as the change is relatively minimal, FIPS Support can edit the existing record to show the new name.	Log a request with FIPS Support. Do not use the Notify Missing Org function as this would create a duplicate employer record.
A match is returned but contains the old company name and they have also moved to a new premises in a different city.	The FIPS user should create a new organisation record if the company name and address is completely different from the result in FIPS.	If the company name and address have changed completely, FIPS Support would not edit the existing record.
Result displayed shows the company details as Anderson Tyres Ltd and address is 103 Smith Road. The correct details are Anderson and Sons Tyres Ltd, address is 103-105 Smiths Road.	Select the employer from the result to attach it to the participant then raise a ticket with FIPS Support for the details to be manually amended.	Do not use the Notify Missing Org option. This would create a duplicate employer record when most of the information displayed is a match but the details need manually edited for accuracy.
The employer has been bought over and the name has changed from KL Scaffolding Services to MacDonald Building Supplies PLC. There are 6 apprentices that are employed with this company on FIPS and all those assignments need to show the new employer information.	Use the employer search to search for the new company details – the new employer details may be listed in the Advanced Search results and can be selected from there. If after searching there is no match displayed, use the Notify Missing Organisation option to create the new company details required.	In this instance, the new name is not similar to the previous name and FIPS Support would not manually edit the details of the existing employer. If the new company details are not returned in the search, this will need to be manually created using Notify Missing Org. Once created it can then be searched for and selected within the other participant assignments.
There is a matching result but FIPS shows the name as Haymarket Roofing Limited and the paperwork / training agreement has this as Haymarket Roofs.	No action required. Select the result displayed in the search results in order to attach it to the participant application or assignment(s).	The employer details are enough of a match and changes to Limited / Ltd / Plc in organisation names are not required in order to be compliant. Select the result returned.
There is a company returned in the Advanced Search but the name shows as “Scottish Sheet Metals” but the paperwork has this as “Scottish Sheet Metals - (Limited)”.	No action is required. Select the result from the employer search to attach it to the participant application or assignment(s).	As above, the information is a match and formatting etc e.g., brackets or dashes does not need to be edited in order for this to be considered compliant by SDS.

#### EDITING EXISTING EMPLOYERS - POINTS TO NOTE

- ✓ If the result returned in the search is now out of date – e.g., company address is not correct, select this record to attach it to the application / assignment. The details can be amended by FIPS Support in order to amend the address details or name of the employer (within reason) at your request.
- ✓ FIPS Support will not change employer names to a name unrelated to the old name e.g., changing Halfords to Blossom Flowers Ltd.
- ✓ Tickets can be logged in URH for any amendments required to employer records – employers must be selected on the application or assignment before updates can be made.
- ✓ Providers cannot amend employer name / address details for existing employers returned in the search in FIPS – if an edit is required, request this via FIPS Support by logging a ticket in the User Requests entity.

## Notify Missing Organisation – Creating Employers

Creating a new employer must only be done when no results have been returned in initial search or the advanced search; at that stage, the Notify Missing Organisation option can be used to create an additional employer record with the required details. The video below demonstrates how to do this in detail:



### **NOTIFY MISSING ORGANISATION - POINTS TO NOTE**

- ✓ The create (Notify Missing) option should only need to be used occasionally if the employer search has been performed per the tutorials in this document. FIPS contains a large database of employers and the advanced search provides additional records from an external source.
- ✓ If there is an approximate match returned in the results but some of the information is out of date, records should be edited / maintained per the guidance in this document. Duplicate employer records should not be created by using the Notify Missing Organisation button.
- ✓ Organisation name, Address Line 1, Town/City and Postcode are all mandatory fields when using the Notify Missing option. If any of these fields are left blank, an error will appear on screen prompting you to add this information to the fields.
- ✓ When an employer is created using the Notify Missing Organisation option, it is assigned to FIPS Support for review. It will either be approved or rejected depending on the accuracy of the information input.
- ✓ If any claims are made on an assignment that has an employer that is not yet approved, the claims will go to Holding status when processed. Once the employer has been approved, the claims will automatically change to Unconfirmed status ready for payment.
- ✓ FIPS Support review employers prior to the weekly finance process to ensure any claims made are removed from Holding and included in the posting run that week.

**All elements of the employer search have been covered in this guidance and FIPS users must ensure the employer search is performed correctly before using the Notify Missing Organisation option to create an additional employer record. Creating a new organisation is the last action in the employer search process as the majority of employers will be returned in the search results. Contact the FIPS Support team using the User Requests entity in FIPS for support.**