

FIPS QUICK START GUIDE

How to Submit an Adopt an Apprentice Application

This guide will explain how to make an Adopt an Apprentice claim for an individual on FIPS. For further information relating to Adopt an Apprentice click <u>here.</u>

1. To open the Adopt an Apprentice application screen, click on Workplace – Adopt an Apprentice entity:

| Skills Development Scotland | rkplace 🗸 Dashboards | > | | | | |
|-----------------------------------|-------------------------|-----------------------|---------------------|-----------------------|---------------------|-------------------------|
| Workplace | Settings | Voice of the Customer | | | | |
| My Work | FIPS | Extensions | | | | |
| Dashboards | Organisations | Applications | Payments | Electris Validations | Contract Milestones | Bulk YPA Claim |
| What's New | Individuals | Programmes | Bulk Expense Author | Change of Circumst | Work Experience Pla | Secondary Eligibilities |
| Activities | State Individual Search | Assignments | Expense Authorisati | Forecasts | Additional Support | Change of Circumst |
| | | Contracts | Contract Change Re | Reactivation Requests | ASN Claims | Incentive Claims |
| | | Alerts | Posting Runs | Adopt An Apprentic | Bulk ITA Course Can | |
| | | Expense Claims | Payment Claims | Participant Samples | ITA Claims | |

2. To input the Adopt an Apprentice information, click on New at the top of the page:



3. All fields that display a red asterisk are mandatory fields. To search for an individual click on the magnifying glass in the Current Assignment field:

| New Adopt An Apprentice A | pplication = | |
|---------------------------|--------------|----------------|
| 4 General | | Select a value |
| Current Assignment * | [| Q |
| Previous Assignment | | |



4. A list of recent records will be displayed. To search, click on Look Up More Records:

| 🗄 SAVE 🛱 SAVE & CLOSE 🕂 NEW 🔅 PRISN | M 🖼 FORM EDITOR | | | Ϋ́ | Ψ. | a) |
|---|--|-----|--|--------|----|-----|
| ADOPT AN APPRENTICE APPLICATION : IN New Adopt An Apprentice | NFORMATION Application = | | | Owner* | | |
| ▲ General | | | | | | ^ |
| Current Assignment * | | ρ | TCTS Assignment Id | | | L |
| Previous Assignment | Jessy Training Ltd - MA - 2019 - GK6Y 2.3-Business and Ad Wran Solutions Limited - MA - 2019 - GM3A 23-Occupational | Â | | | | l |
| - Details | Meranne Organisation Limited - MA - 2019 - GH60 23-S | | | | | l |
| Training Provider Details | Molly - MA - 2019 - GKEX 22-Business and Adm | | | | | L |
| Contact Name (Training Provider)* | | | Telephone Number (Training Provider) * | | | |
| Email Address (Training Provider) * | Look up more records | ~ | Mobile Number (Training Provider) | | | |
| Previous Employment | 10 results + 1 | Nee | | | | |
| Date of Redundancy | | | Previous Employer Name * | | | |
| Reason for Redundancy * | | | Previous Employer Address: Street 1 * | | | |
| | | | Previous Employer Address: City * | | | |
| Previous MA Level * | | | Previous Employer Address: Post Code * | | | |
| Previous MA Start Date * | | | | | | ~ |
| Anti-un | | | | | | |

5. In the Lookup Record screen, search for the name of the individual the application relates to. Click to the left of the individual's name to activate the checkbox and then "Add".

| Look for | Assignment | \sim | Show Only My Records |
|----------|----------------------------|---------|--|
| Look in | Assignment Lookup View | × | |
| Court | io test | × | |
| JealCh | , | | |
| | | | |
| | | | |
| 1 | Name | | Registered Organ |
| | | | Registered organ |
| - | | | T negistered organ |
| | Jo Test - NTP HUB DEMO ONI | .Y - MA | - 2018 - G NTP HUB DEMO ONL |
| | Jo Test - NTP HUB DEMO ONI | .Y - MA | - 2018 - G NTP HUB DEMO ONL |
| | Jo Test - NTP HUB DEMO ONI | .Y - MA | - 2018 - G.,. NTP HUB DEMO ONL |
| | Jo Test - NTP HUB DEMO ONI | .Y - MA | - 2018 - G NTP HUB DEMO ONL |
| | Jo Test - NTP HUB DEMO ONI | .Y - MA | - 2018 - G., NTP HUB DEMO ONL |
| | Jo Test - NTP HUB DEMO ONI | -Y - MA | - 2018 - G NTP HUB DEMO ONL |
| • | Jo Test - NTP HUB DEMO ONI | _Y - MA | - 2018 - G NTP HUB DEMO ONL |
| | Jo Test - NTP HUB DEMO ONI | .Y - MA | - 2018 - G NTP HUB DEMO ONL |
| | Jo Test - NTP HUB DEMO ONI | .Y - MA | - 2018 - G NTP HUB DEMO ONL |
| C | Jo Test - NTP HUB DEMO ONI | .Y - MA | 2018 - G NTP HUB DEMO ONL X ← Page 1 → |

6. Complete all the mandatory fields on the application and click on Save at the bottom of the page. The Submit Application button will appear at the top of the page when all fields have been populated:

| 土 INEMA 🕅 DEFETE 🍈 KNI2WI 🌹 KKOLESS - 🖄 МЭЗИЛИ 🖓 ЭШИКЕ АБ ЭШИКЕ ЗЕСПКЕЛ LIEFDS 🦛 EMMIF |
|--|
| ADOPT AN APPRENTICE APPLICATION : INFORMATION |
| Jo Test - NTP HUB DEMO ONLY - MA - 2018 - GL3L 23 📹 |
| |
| Submit Application |



7. Click Submit Application. A dialog box will appear - click Next > then Finish to send the application for approval by SDS:

| AAA: Dialog - Submit Application - Microsoft Edge | - | | × |
|--|--------------|-----------|--------|
| A https://sdsfipsuat.crm4.dynamics.com/cs/dialog/rundialog.aspx?Dia | alogid=97824 | 461d-c6fc | 4005-9 |
| AAA: Dialog - Submit Application Page 1 | | | |
| This will set the Status Reason to Application Submitted, do you wish to proceed? | Tip | | > |
| | | | |
| | | | |
| Click to add comments | I | | |
| Help Summary | <u>N</u> ext | Canc | el |

8. The details are reviewed by SDS when the status of the application shows as Submitted for Approval. Once the application has been approved, an Alert will be generated advising that the Funding Assistance Agreement can now be printed:

| Adopt an Apprentice - Funding Assistance Agree You can now print the Funding Assistance Agree 🧑 Jo Test - NTP HUB 12/08/2019 12:55 | | Adopt an Apprentice - Funding Assistance Agree | You can now print the Funding Assistance Agree | 👌 Jo Test - NTP HUB | 12/08/2019 12:55 | |
|--|--|--|--|---------------------|------------------|--|
|--|--|--|--|---------------------|------------------|--|

9. Click on the hyperlink in the Alert to view the application. Click on the dots at the top of the page to view additional actions. Click on Run Report then Funding Assistance Agreement to open the agreement:

| ow | •••• | | | |
|----|--------------------|----|--------------------------|------------------|
| | Start Dialog | | | 0.4 |
| | Word Templates | • | | ۵ ⁰ 2 |
| | 🖻 Run Report | • | Run on Current Record | |
| | 2 Other Activities | ۰. | De Minimis Letter | |
| | Form Editor | | Funding Assistance Agree | |

10. You can convert the Funding Assistance Agreement into a Word document by clicking on the Save icon and selecting Word. This document should be signed and dated by the apprentice, Training Provider and employer:

| Edit Filter | |
|---|---------------------|
| < 1 of 2 ? > > Č) ⓒ 100% ✓ | |
| Skills Development | Word |
| Funding Assistance Agreement | Excel |
| Provider") for Jo Test ("Apprentice") this agreement confirms that The Skills Development Sc Co. Limited ("SDS") agrees that the eligibility criteria have been met by the Training Provide the partice to this agreement confirms that The Skills Development Sc | PowerPoint |
| Adopt an Apprentice scheme on the terms set out in this agreement. | Acrobat (PDF) file |
| SDS will make a payment of £2000 ("the Contribution") to the Training Provider on comment by the Apprentice of the apprenticeship and full required details being properly entered onto Funding, Information and Processing System (FIPS) operated by SDS. The Training Provid make payment of the full Contribution to the employer identified below ("Employer") within 14 | TIFF File |
| of the funding being received by the Training Provider from SDS. Evidence of payment of the full Contribution in accordance with this agreement must be reta | MHTML (web archive) |



11. When the FAA has been signed it can now be uploaded to the application. Scroll down to Outstanding Evidence and click on the hyperlink to open:

| Outstanding Evidence | | | | | | | |
|------------------------------|-----------------------------|-----------------|---------------------|---------------|--------------|---------------|---------------|
| | | | | | | | |
| Name | Evidence Request Text | Туре | Linked To | Payment Claim | Payment Plan | Expense Claim | Status Reason |
| AAA Upload Funding Agreement | Please upload a completed a | Document Upload | Adopt An Apprentice | | | | Requested |

12. On the next page click on enter a note to upload the document:

| Evidence : submission (training provider) • AAA Upload Funding Agreement "= |
|--|
| Information |
| Please upload a completed and signed Funding Assistance Agreement? Please attach your document using the notes section below to satisfy this evidence request. 1. Below the Notes label. click <i>Enter a note</i> . 2. Add a relevant Title. 3. Click Attach then Browse to find your file. 4. Finally, click Done. 5. The document will be processed in the background. Refresh the window or return to this record at a later date to see the result. |
| Attachments |
| Enter a note |

13. This will change the view and a Browse box will appear. Click on this and select the completed FAA from your computer. Once attached click Done then Save.

| Title | | | |
|-------|--|--|--|
| | | | |
| | | | |
| | | | |

14. Return to the application and a tab appears at the top of the page – Submit Evidence for Payment:



15. Click Submit, Next > then Finish. This sends the application to SDS for review. Once approved an Alert will be issued advising that it will be paid in the next posting run.