



BFFS 2.4 Release Training Video Script

“BFFS Push to Beneficiary Record”

(TMS # 3944942)

Hi there! Today we’re going to provide you with details for the FELux and the Accounting Wizard pushing information to the beneficiary record in BFFS.



If you want additional information on all the updates we’ve made to BFFS with the 2.4 release, check out the video called “BFFS Release 2.4 Overview.” You can find this video on the BFFS SharePoint site. Let’s get started!



Beneficiary Fiduciary Field System (BFFS)

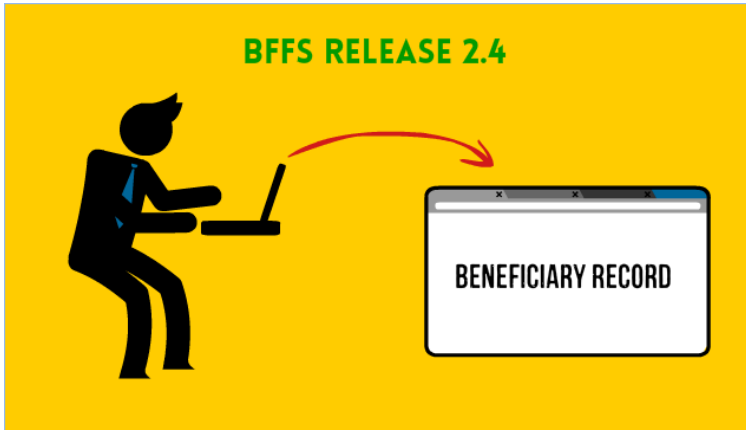
Pension and Fiduciary Service, Fiduciary Staff (21F)

Updated 6/19/2015





With the 2.4 release, information that is input into the FELux and/or Accounting Wizard will push to the beneficiary record.



When the LIE completes a work item, BFFS will now conduct a search of corresponding fields in the beneficiary record and FELux or Accounting Wizard.



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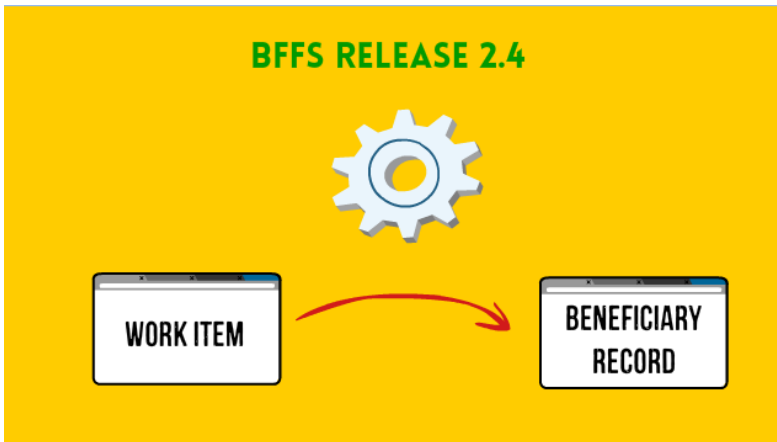


If the fields don't match, the LIE must verify what information is the correct information.

BFFS RELEASE 2.4

Field	Update	Value	Currently on Beneficiary
Accounting date:	<input checked="" type="checkbox"/>	09/18/2015	
Accounting Type	<input checked="" type="checkbox"/>	Federal	
Accounting Due Reason	<input checked="" type="checkbox"/>	Estate > \$10K	
Bene Mailing Street 1:	<input checked="" type="checkbox"/>	8976 ... St	438 SOUTH ST
Bene Mailing Zip:	<input checked="" type="checkbox"/>	49675	45217

The biggest change with this release is that BFFS will no longer pull information from the work item...



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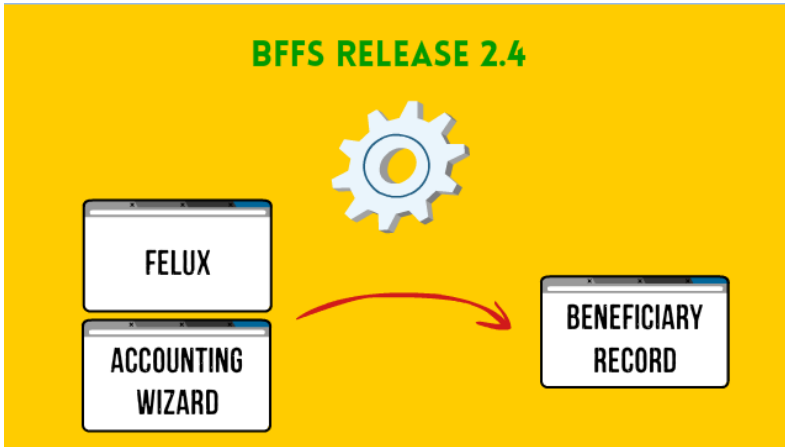
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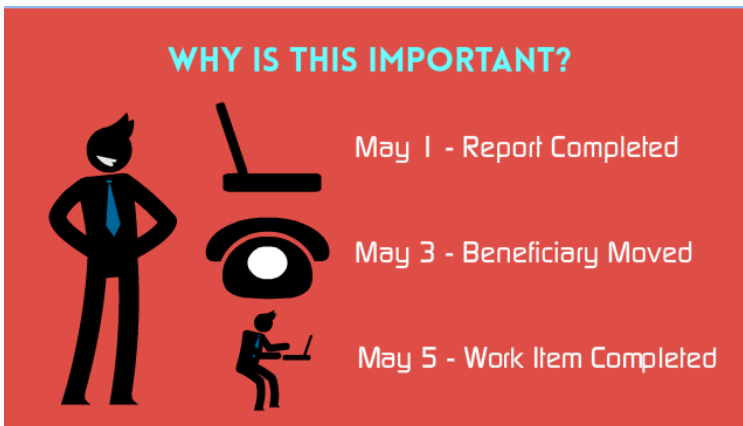




...it will now pull the information from FELUX and the Accounting Wizard.



So why is this important? Let's use an example. Let's say the field examiner completes his report on May 1. Then, on May 3, the hub receives notification that the beneficiary moved and the address is updated in BFFS. If the work item isn't closed until May 5, we can immediately see the discrepancy and select the correct information for the beneficiary record, ensuring better data integrity.



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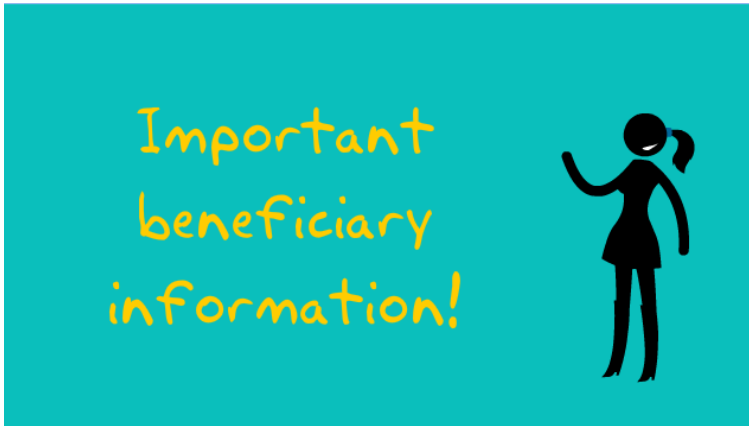
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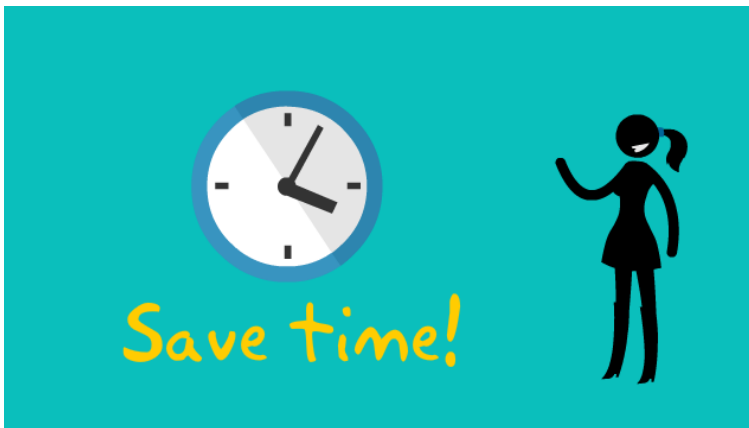




Also, since the weight of the information you put into the Accounting Wizard or FELux is so important, now it will push to the beneficiary and fiduciary record.



The good news is, it will save time when closing work items, since BFFS will automatically conduct a search on fields the LIEs would otherwise have to update.



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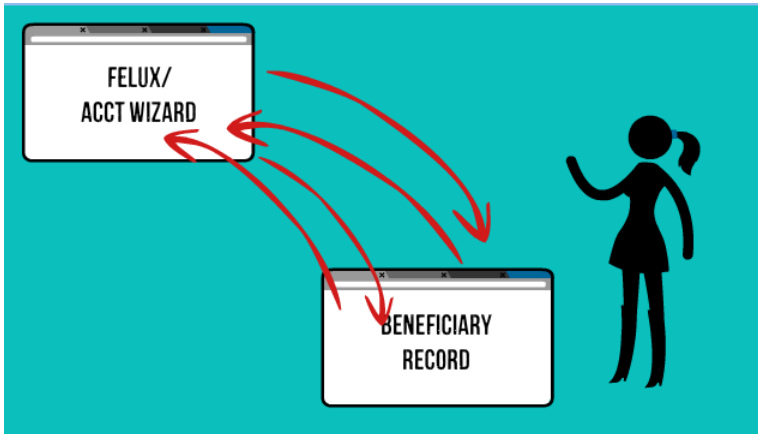
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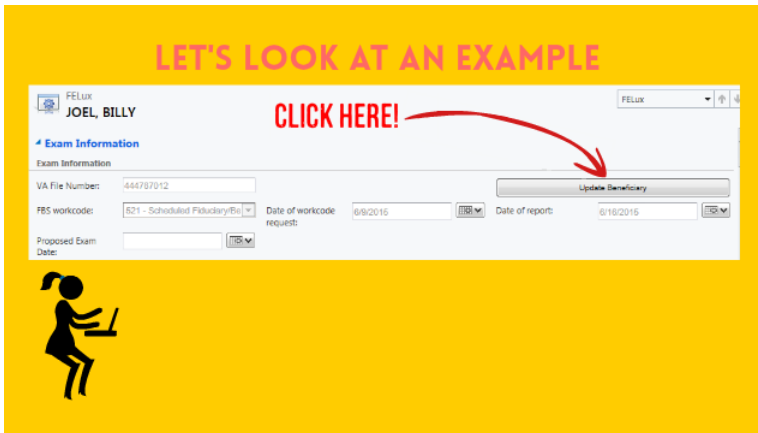




This will eliminate the duplicate work of having to update information in multiple places.



So, let's look at an example. Let's say I am the LIE and I am closing a follow-up field exam.



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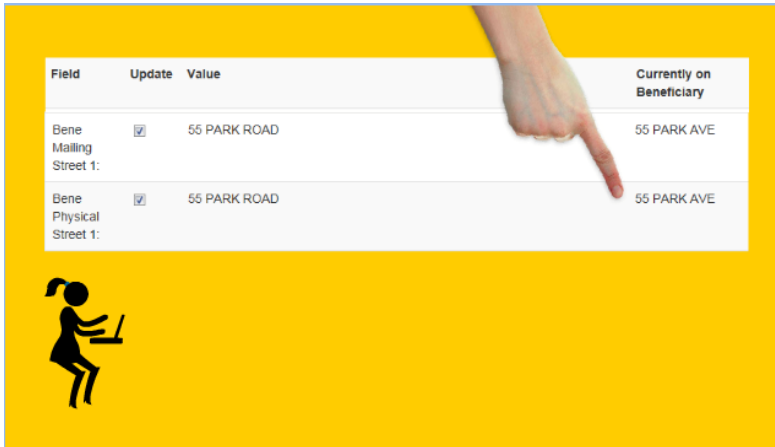
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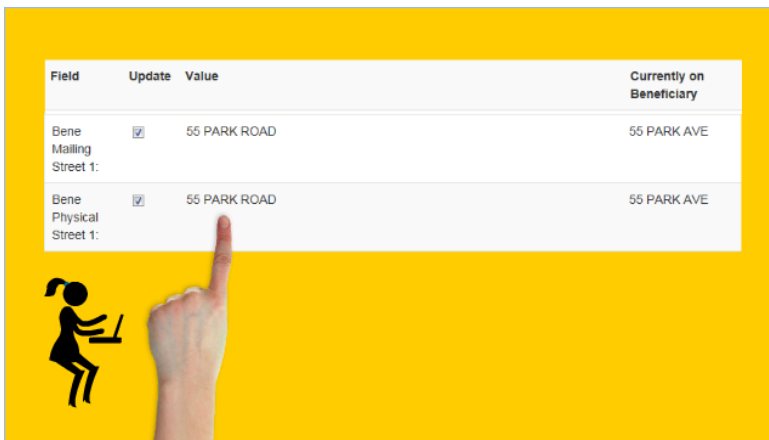


You can see here – the address on the beneficiary record says the address is 55 Park Avenue.



Field	Update	Value	Currently on Beneficiary
Bene Mailing Street 1:	<input checked="" type="checkbox"/>	55 PARK ROAD	55 PARK AVE
Bene Physical Street 1:	<input checked="" type="checkbox"/>	55 PARK ROAD	55 PARK AVE

But the field examiner entered the address as 55 Park Road.



Field	Update	Value	Currently on Beneficiary
Bene Mailing Street 1:	<input checked="" type="checkbox"/>	55 PARK ROAD	55 PARK AVE
Bene Physical Street 1:	<input checked="" type="checkbox"/>	55 PARK ROAD	55 PARK AVE

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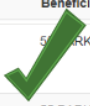





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I confirmed that 55 Park Avenue is the correct address and the field examiner just accidentally typed it incorrectly.

Field	Update	Value	Currently on Beneficiary
Bene Mailing Street 1:	<input checked="" type="checkbox"/>	55 PARK ROAD	55 PARK AVE
Bene Physical Street 1:	<input checked="" type="checkbox"/>	55 PARK ROAD	55 PARK AVE



Now I choose the correct information.

Field	Update	Value	Currently on Beneficiary
Bene Mailing Street 1:	<input checked="" type="checkbox"/>	55 PARK ROAD	55 PARK AVE
Bene Physical Street 1:	<input checked="" type="checkbox"/>	55 PARK ROAD	55 PARK AVE



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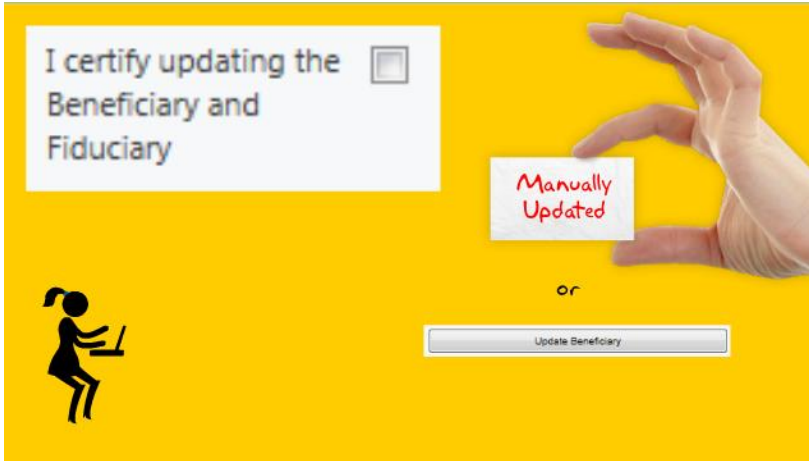
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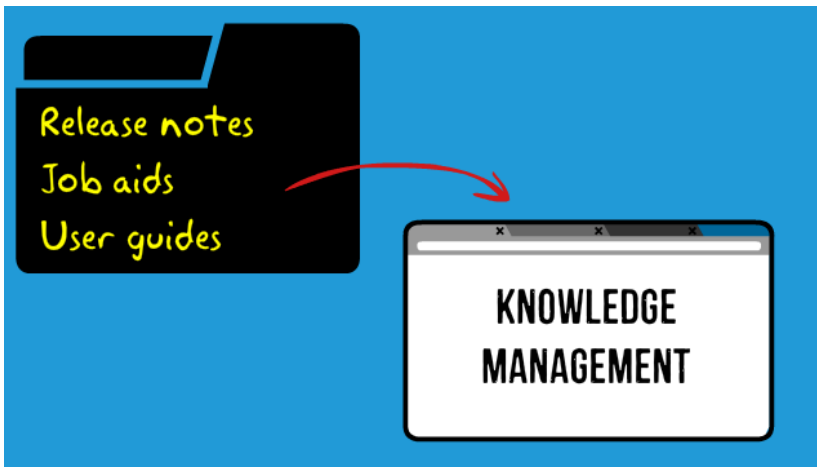
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Once the correct information is selected, the LIE will click this button – “I certify updating the beneficiary and fiduciary.” This means that the LIE has either manually updated or used the new beneficiary record push functionality to confirm the correct information.



Detailed release notes, job aids, and user guides can be found on Knowledge Management.



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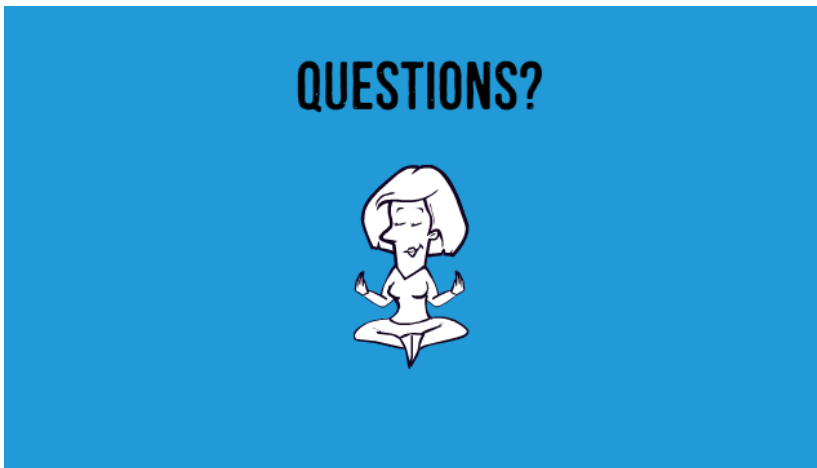




If you have questions, use the BFFS assistant, located here, on the BFFS SharePoint site.



Or, check with your hub's BFFS SuperUsers. As always, if you have any suggestions on how we can continue to improve BFFS, submit them to the BFFS SharePoint site.



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Thanks for watching!

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