



Pension and Fiduciary (P&F) Service

Field Examiner Fiduciary Device Tips & Tricks

Accessing Your iPhone's Wi-Fi Hotspot

In order to use your fiduciary device to its fullest capabilities outside of your normal office workstation, access your government furnished iPhone's Wi-Fi hotspot functionality and turn it on. Turning it on will allow you to connect your device to the internet during a field examination.

How to Set up Personal Hotspot

1. Go to Settings > Cellular or Settings > Personal Hotspot.
2. Tap the slider next to Allow Others to Join.

Connecting in Prior to Initiating Field Examination

Since connecting to the internet and logging into your VPN can often take several minutes, it is recommend to connect to Cisco Direct Connect and log in to the VA systems necessary to complete your exam in your GOV prior to entering the facility or residence of the interviewee.

Using Your Device's Camera

Instead of taking the time locate the appropriate administrator in a beneficiary's facility to request a copy of the facility license, you can use your device's camera to take a picture of the posted facility license to save time.

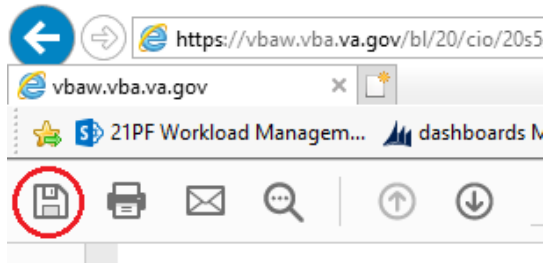
On the Spot Credit Checks

If some fiduciaries may be willing to serve but are unsure if their credit history renders them ineligible to serve, you can obtain permission to run the prospective fiduciary's credit report on the spot. This will speed up the appointment process by more quickly confirming or ruling out a potential fiduciary.

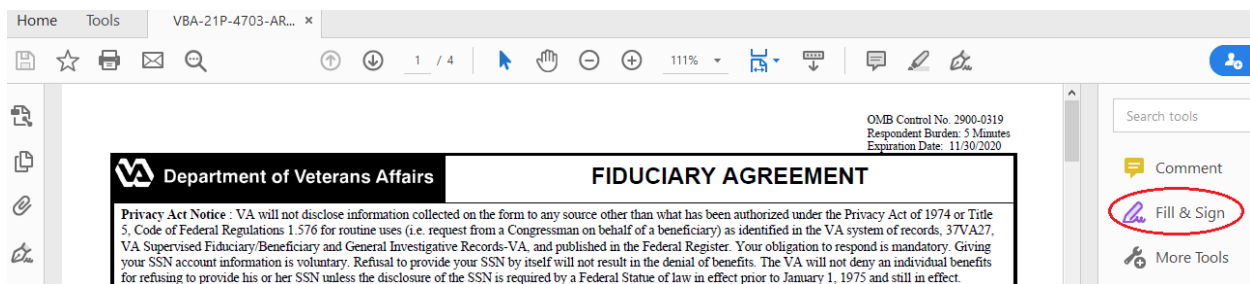
Obtaining Digital Signatures and Uploading the Appropriate Form

Follow the steps outlined below to obtain a digital signature on VA Form 21-4703, Fiduciary Agreement and save the document in the proper format to upload it into VBMS.

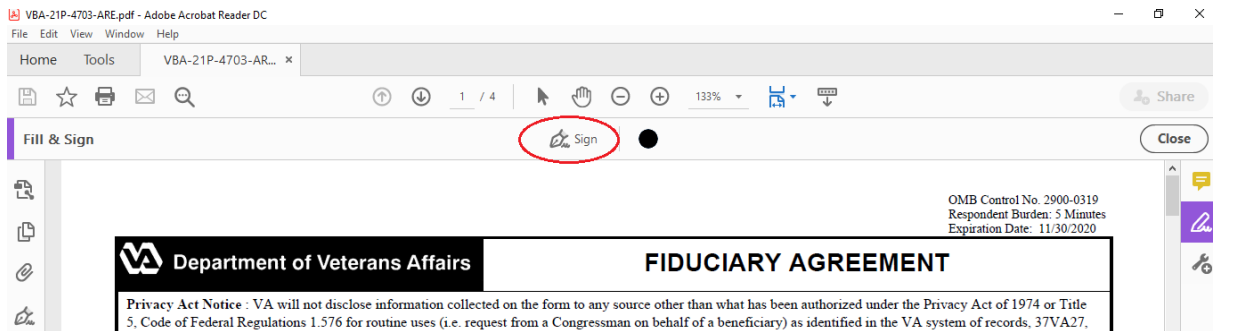
Access a copy of the form Compensation Service Publications Website:
<https://vbaw.vba.va.gov/bl/20/cio/20s5/forms/VBA-21P-4703-ARE.pdf>



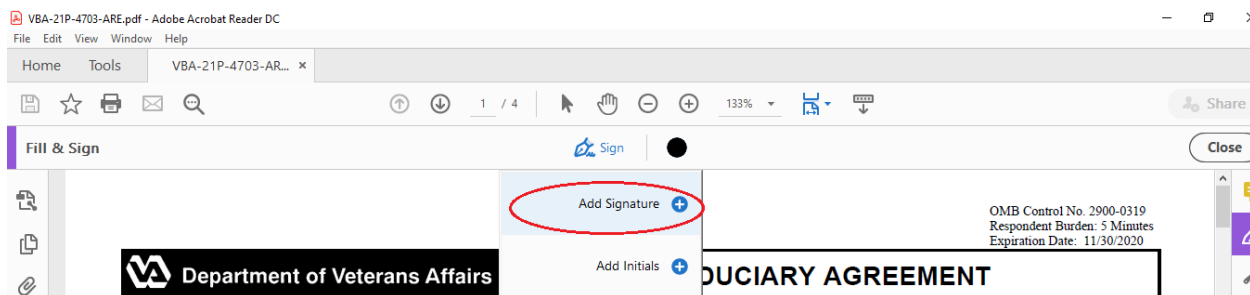
Save a copy onto your device.



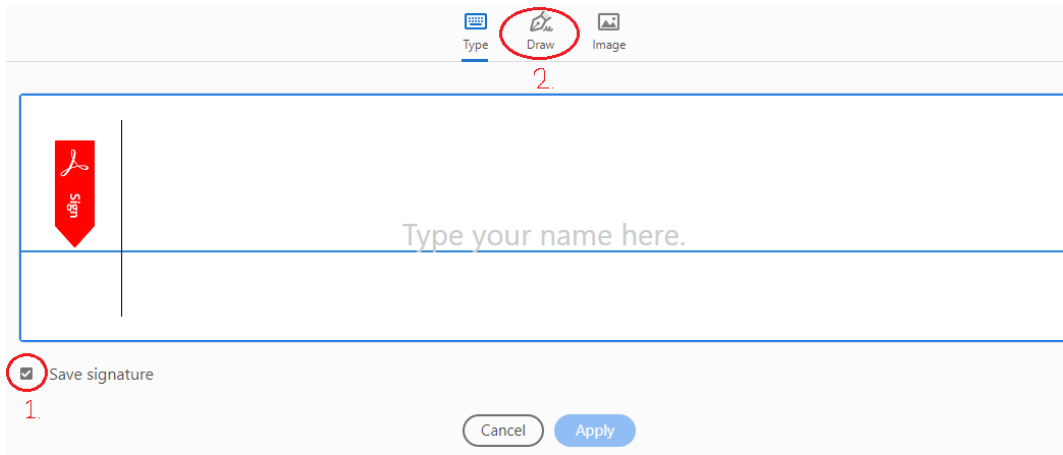
Open the file on your desktop. If necessary, first select the button for **Enable All Content** at the pop bar at the top of the screen. Select **Fill & Sign** on the right side of the Adobe Reader screen.



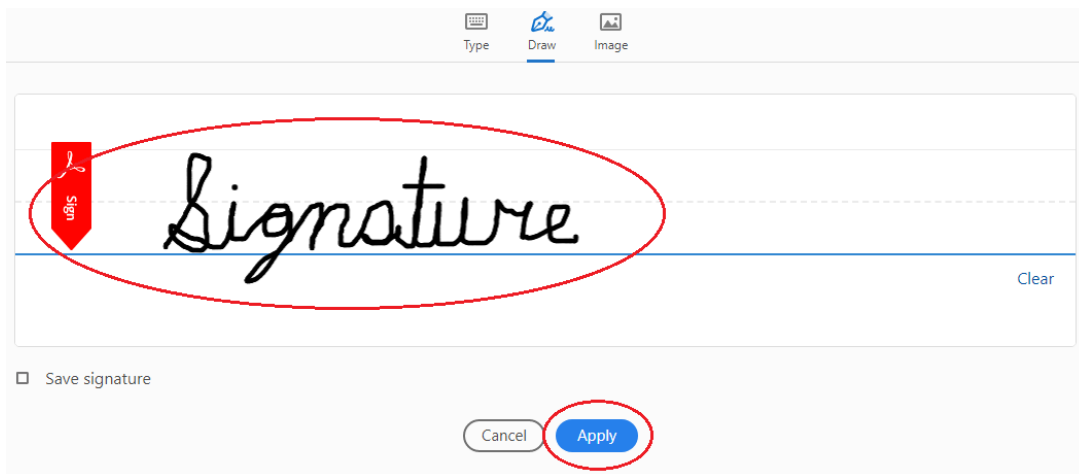
Select the **Sign** button at the top of the screen.



Select **Add Signature** from the drop down.



Uncheck the box next to **Save Signature** on the bottom left corner of the box and then select the **Draw** button.



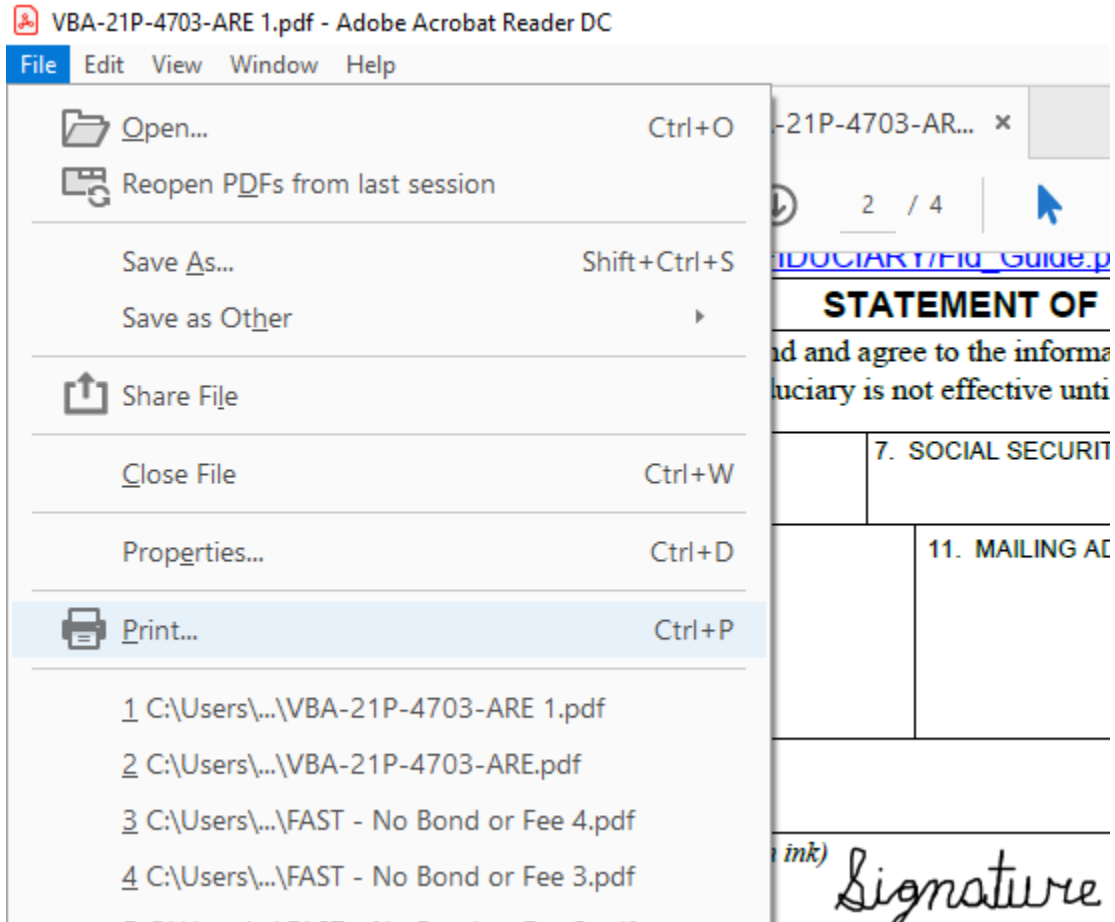
Obtain signature in this field, and then select **Apply**.

Note: It is possible and acceptable for the fiduciary to sign with a mouse, stylus, or their finger dependent on device capabilities.

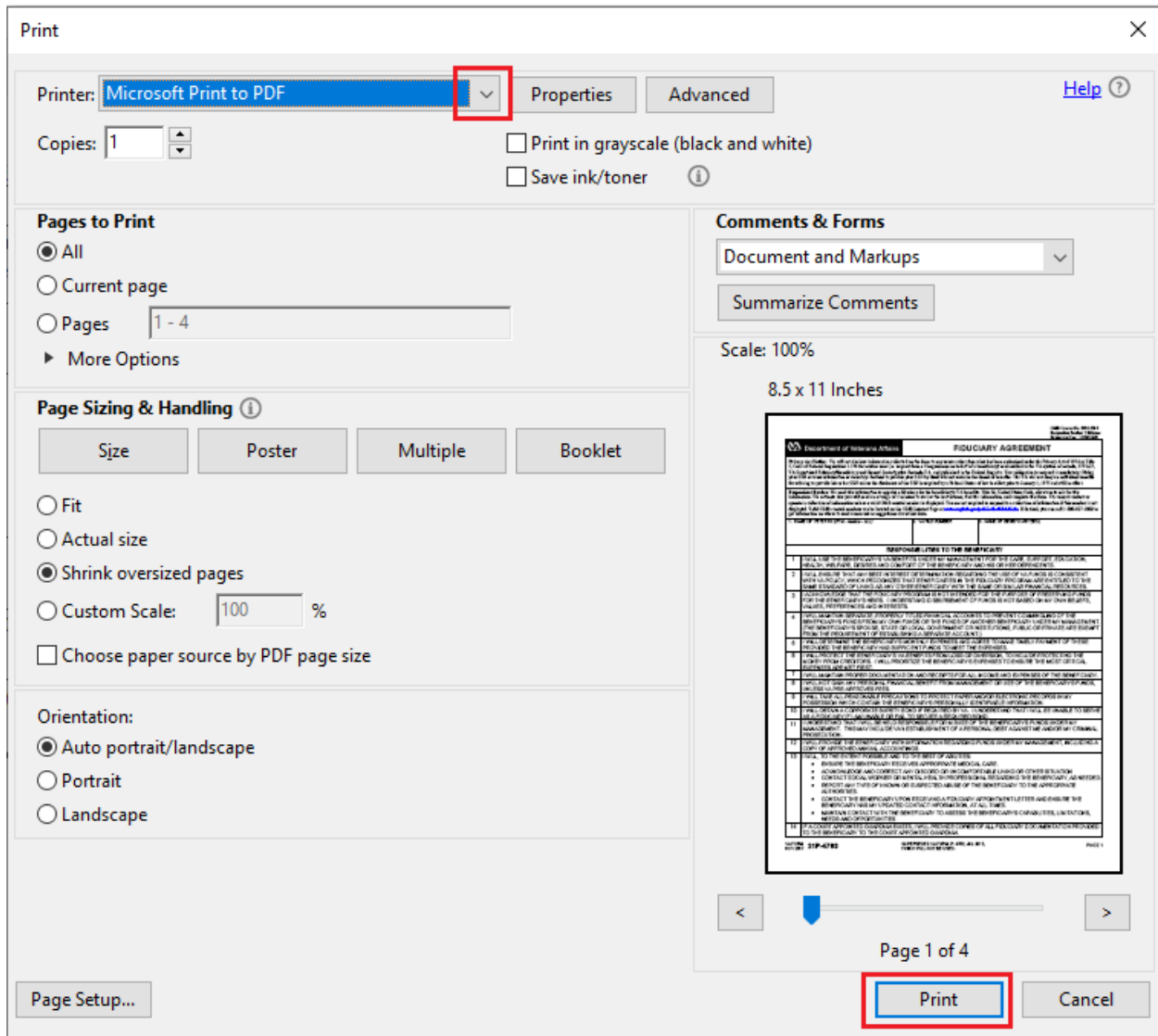
13. SOURCE OF INCOME	A A [trash icon]	14. APPROXIMATE ANNUAL INCOME
15. SIGNATURE OF PROPOSED FIDUCIARY (Sign in ink)	Signature	16. DATE
17. SIGNATURE OF FIELD EXAMINER (Sign in ink)		18. DATE

Scroll down to Block 15 on the form and click within the box to apply the signature. Repeat as needed

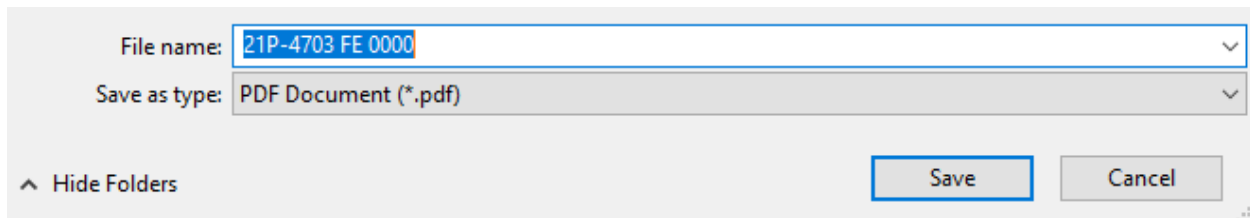
for your own signature in Block 17.



When the form has all necessary fields filled and signatures obtained, select **File**, then **Print...**



Use the drop down in the top left to ensure the printer selected is either **Microsoft Print to PDF** or **Adobe PDF**, then select **Print**.



Save the file with a name and location you will be able to remember. The .pdf located at this location will be the final version that can be uploaded to our systems as needed.