

# Fiduciary Accountings Submission Tool (FAST)

## Training Job Aid

### Review Unlock Request



#### Objective

To provide the supervisor with steps on how to review an unlock request submitted by the LIE/FSR/Superuser

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#### Audience

User: Supervisor

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#### Prerequisite

The LIE/FSR/Superuser will request an accounting to be unlocked.

#### Instructions

1. Login to **Salesforce** (Salesforce Homepage)

Sign in with your organizational account

someone@example.com

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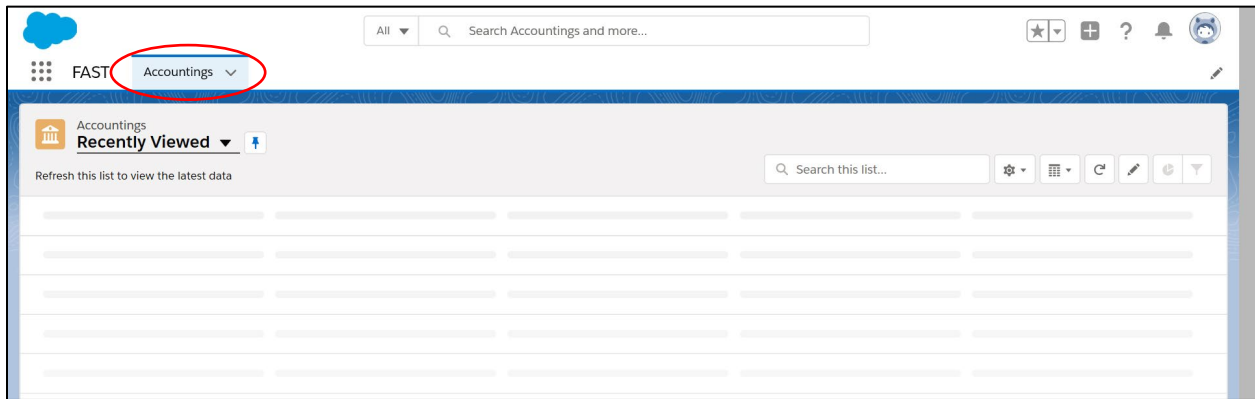
Sign in

[Sign in using an X.509 certificate](#)

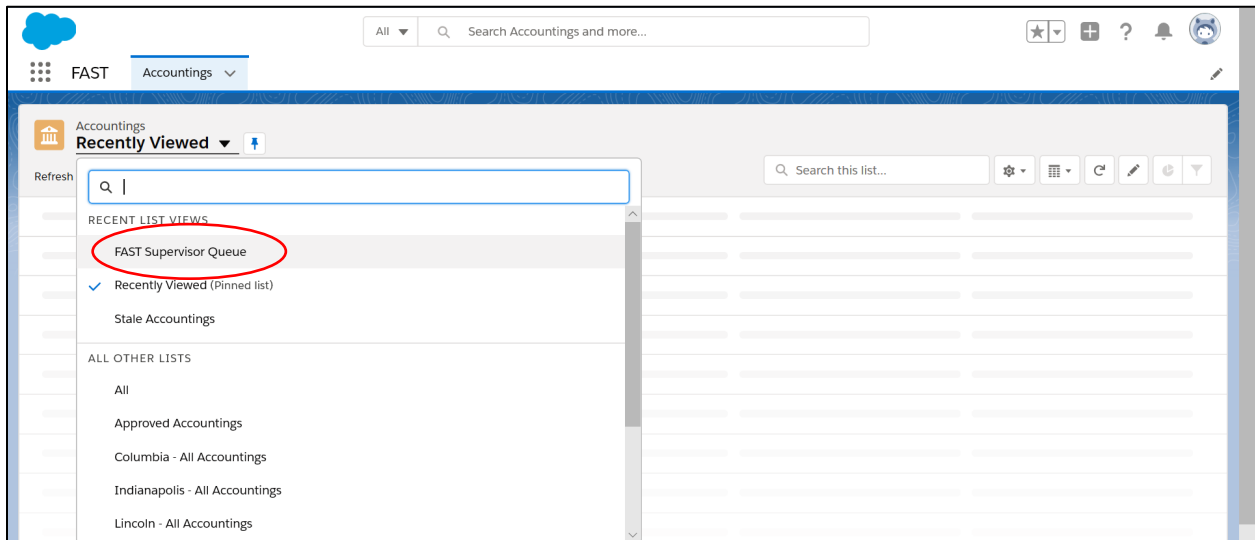


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2. Click **Accountings** tab



3. **Select** FAST Supervisor Queue listview



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#### 4. Select the **appropriate accounting**

The screenshot shows the FAST Accountings Supervisor Queue interface. At the top, there is a search bar and navigation icons. Below the header, the page title is 'FAST Supervisor Queue'. A search bar for the list is present. The main content is a table with the following columns: Accounting Name, Unlock Requestor, VA Fiduciary Hub, Justification for Unlock, and Name of Beneficiary. The first row contains the following data: 'Training Accounting 4-1-2020 4-29-2020', 'FAST LIE User 2', 'Columbia 319', 'Unlock Justification.', and 'Training Accounting'. This first row is circled in red.

Accounting Name	Unlock Requestor	VA Fiduciary Hub	Justification for Unlock	Name of Beneficiary
Training Accounting 4-1-2020 4-29-2020	FAST LIE User 2	Columbia 319	Unlock Justification.	Training Accounting

#### 5. Navigate to the **Approval History** section

The screenshot shows the details page for an accounting item. The left sidebar contains sections for 'Details', 'Review Information', and 'Reporting'. The 'Review Information' section shows the status as 'Approved - Unlock Requested', the reviewer as 'FAST LIE User 2', and the veteran's name. The 'Reporting' section shows the submitted date as '4/1/2020 12:05 PM' and the approval date as '4/1/2020 1:30 PM'. The right sidebar contains a 'Files (1)' section with a PDF file '(4706b) Training Accounting-2020-04-01 17:30:56.pdf' and an 'Approval History (2)' section. The 'Approval History (2)' section is circled in red and contains two entries: 'Approve the unlock' and 'Approval Request Submitted', both dated '4/1/2020 1:39 PM'.

Submitted Date	Approval Date
4/1/2020 12:05 PM	4/1/2020 1:30 PM



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6. Click the **Approve the Unlock** record. The supervisor will decide if the unlock request is approved or rejected. If the supervisor would like to approve the request, click [Scenario 1](#). If the supervisor would like to reject the request, click [Scenario 2](#).

The screenshot shows the FAST interface with a search bar at the top. The main content area is divided into two columns. The left column, titled 'Details', contains sections for 'Review Information' and 'Reporting'. The 'Review Information' section shows the status as 'Approved - Unlock Requested', the reviewer as 'FAST LIE User 2', and the veteran's name. The 'Reporting' section shows the submitted date as '4/1/2020 12:05 PM' and the approval date as '4/1/2020 1:30 PM'. The right column, titled 'Files (1)', shows a PDF file named '(4706b) Training Accounting-2020-04-01 17:30:56.pdf'. Below the files is the 'Approval History (2)' section, which lists two entries. The first entry, 'Approve the unlock', is circled in red and shows a date of '4/1/2020 1:39 PM' and a status of 'Pending'. The second entry, 'Approval Request Submitted', shows a date of '4/1/2020 1:39 PM' and a status of 'Submitted'.

## Scenario 1: Accept the Unlock Request

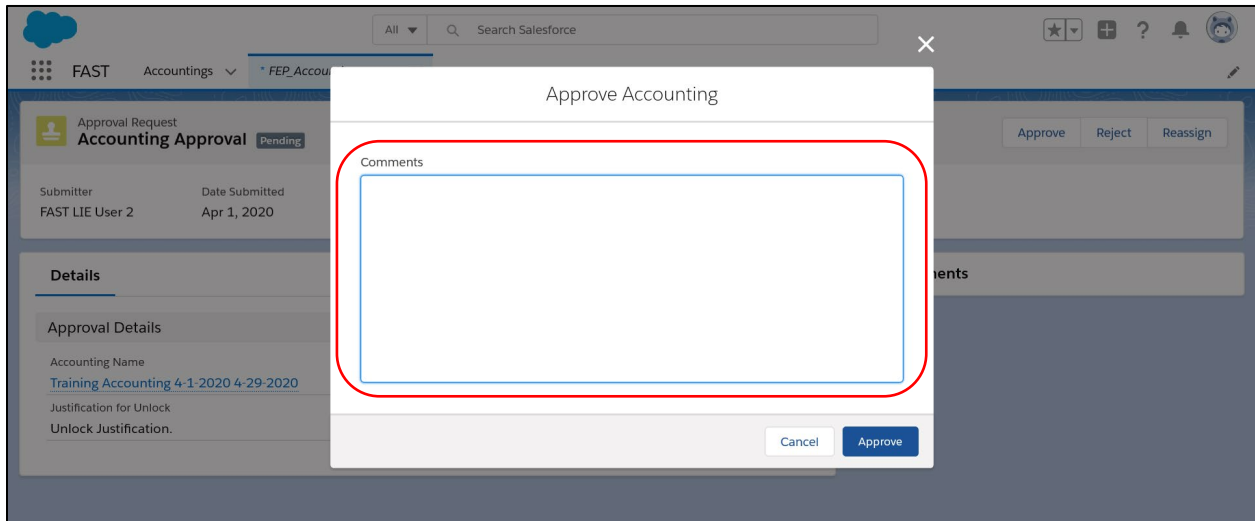
1. Click **Approve**

The screenshot shows the FAST interface with a search bar at the top. The main content area is divided into two columns. The left column, titled 'Approval Request', shows the status as 'Accounting Approval' and 'Pending'. The right column, titled 'Details', shows the submitter as 'FAST LIE User 2', the date submitted as 'Apr 1, 2020', the actual approver as 'FAST Supervisor Queue', and the assigned to as 'FAST Supervisor Queue'. Below the details is the 'Approval Details' section, which shows the accounting name as 'Training Accounting 4-1-2020 4-29-2020' and the owner as 'FAST Authorized Reviewers Queue'. The right column, titled 'No Comments', is empty. The 'Approve' button is circled in red.

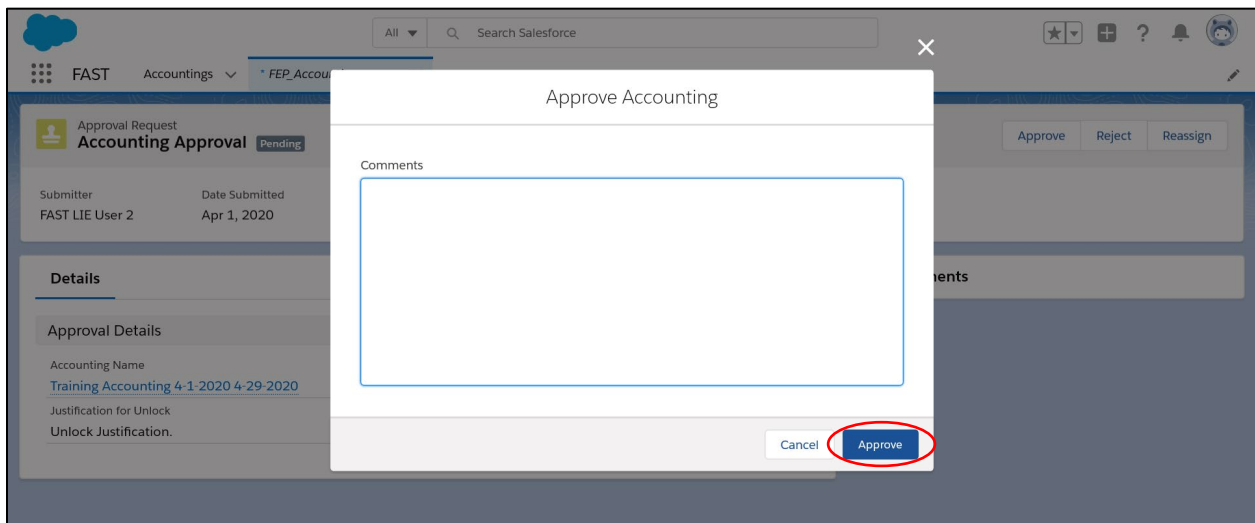


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## 2. Add Comments (if necessary)



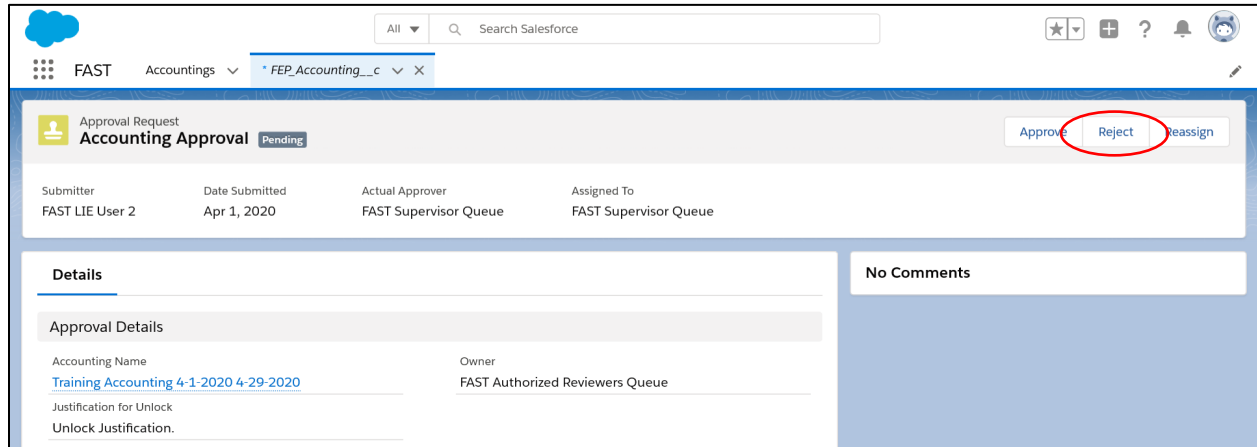
## 3. Click Approve



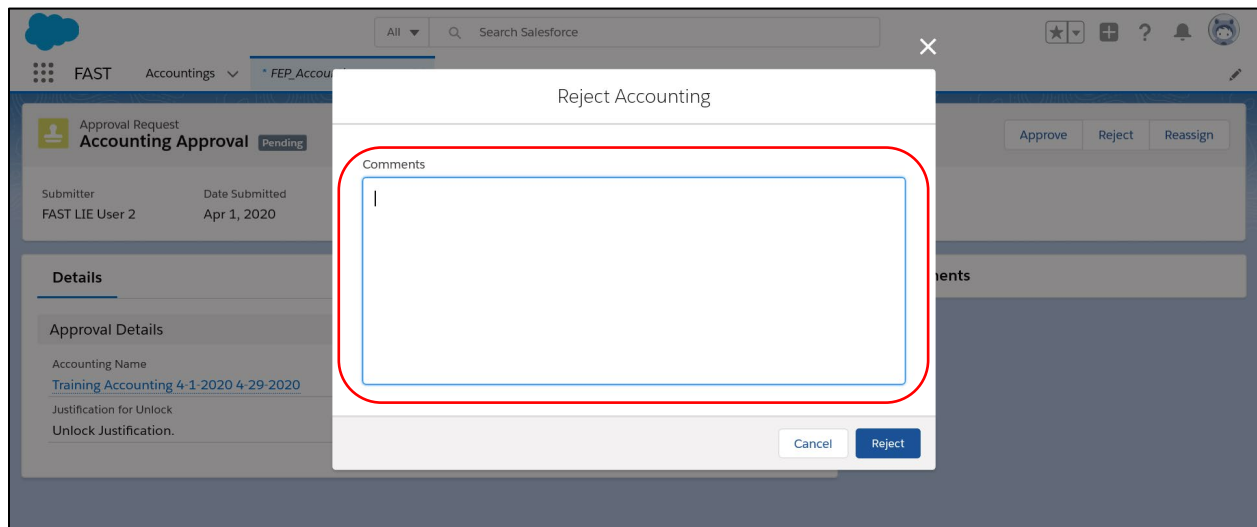
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## Scenario 2: Reject the Unlock Request

1. Click **Reject**. The status of the accounting should now be reflected as **Approved** and no further action is needed.



2. Add **Comments** (if necessary)

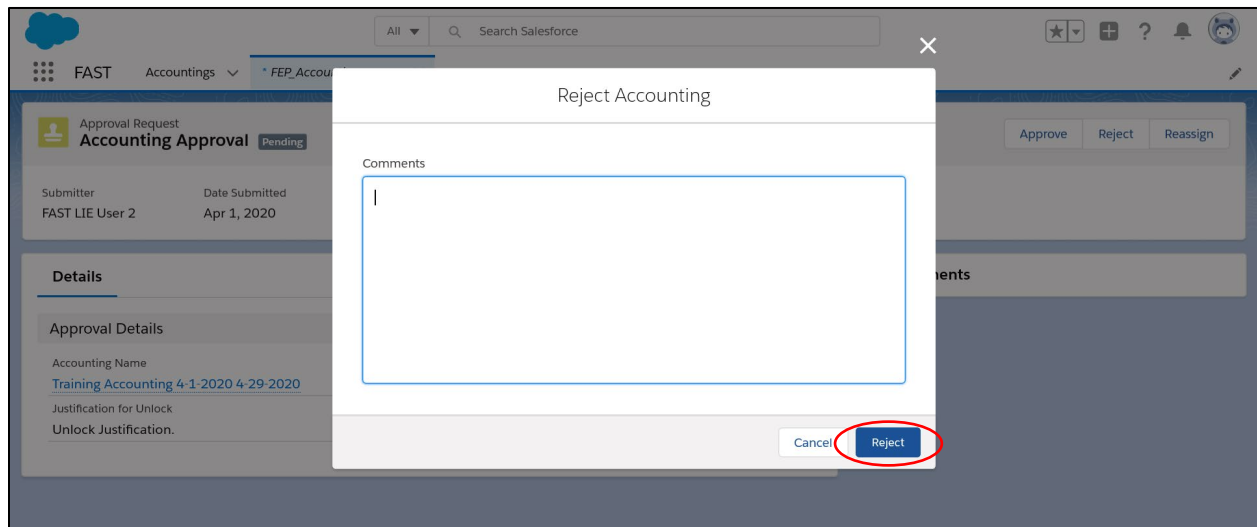


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#### 3. Click **Reject**



## Outcome

The supervisor will accept or reject an unlock request made by the LIE/FSR/Superuser.

