

Fiduciary Accountings Submission Tool (FAST) Training Job Aid Application Access



Objective

To provide the supervisor with steps on how to review a POC/ Individual Fiduciaries self-registration request.



Audience

User: Supervisor

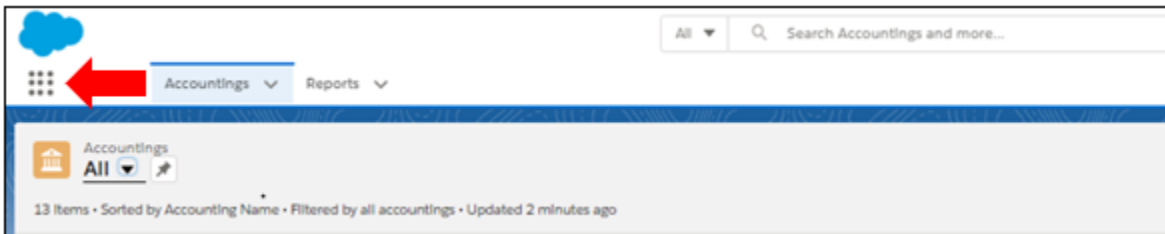
Prerequisite

The Fiduciary will self-register to utilize FAST.

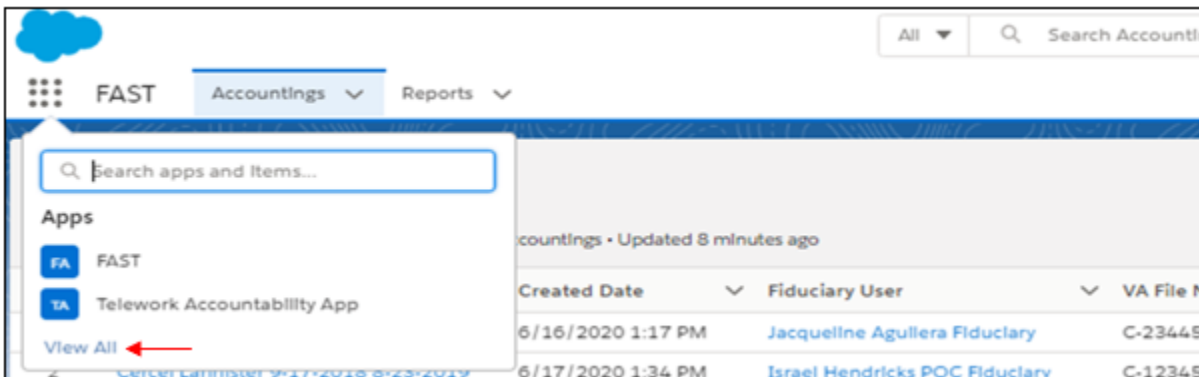
Instructions

Log into **Salesforce**

1. Click the **Apps** icon at the top left of the homepage screen.

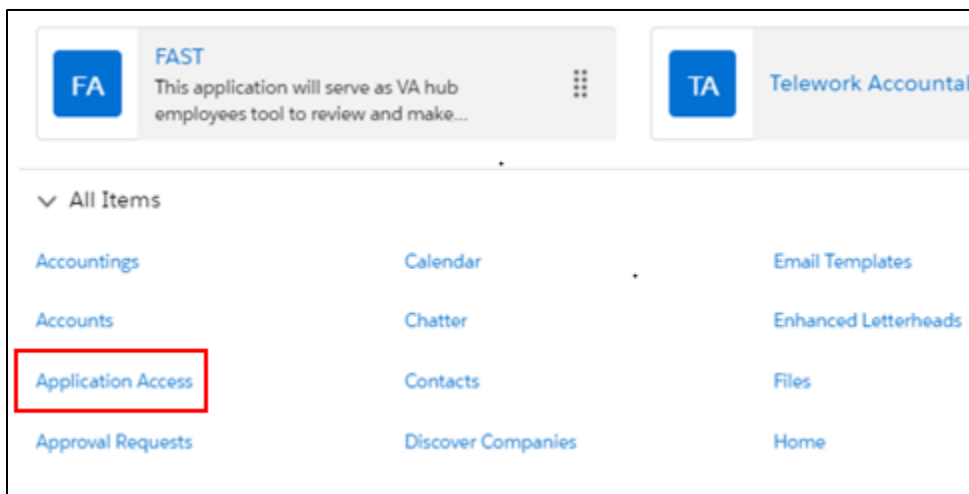


2. Then click the **View All** button.

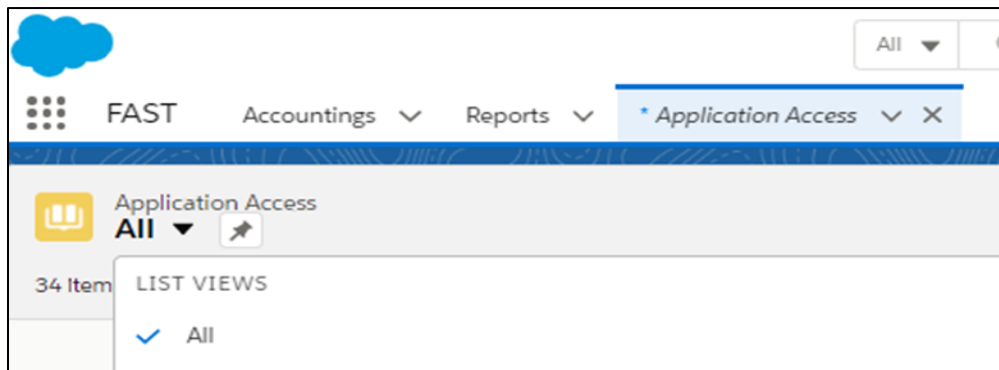


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- Next, click the **Application Access** button.



- Click the dropdown for **list views** and select all.



- Under this list view you will be able to view all applications pertaining to the self-registration process. There are five different statuses you can review these applications under.
 - **Not started**- This status means the Fiduciary didn't complete the self-registration process. This status will then be turned to a canceled status after 72 hours. (If an application is in this status you will not be able to approve it)
 - **In process**- This status means the Fiduciary completed the self-registration process and the application needs to be approved by supervisor or superuser.
 - **Approved**- This status means the Fiduciary account has been reviewed by the supervisor or superuser for validation.
 - **Rejected**- This status means the Fiduciary account was reviewed by the supervisor or superuser and they were unable to validate the information provided by Fiduciary.
 - **Status Complete**- This status means the Fiduciary is now able to access FAST.



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6. Scroll down the list view and click on the correct **Application Access Record** for approval/rejection. Please note the **“In Process”** status is the only status where you can approve or reject an application request.

Application Acc...	C...	ContactIDPermissioSe...	Application ...	Ina...	Approval Status	Created Date
1 AA-11506		a4m250000007xt1AAA	FAST	<input type="checkbox"/>	Not Started	6/16/2020 6:30 AM
2 AA-11507		a4m250000007xt6AAA	FAST	<input type="checkbox"/>	Not Started	6/16/2020 6:30 AM
3 AA-11508		a4m250000007xt6AAA	FAST	<input type="checkbox"/>	Approved	6/16/2020 6:30 AM
4 AA-11509		a4m250000007xt6AAA	FAST	<input type="checkbox"/>	In Process	6/16/2020 6:30 AM
5 AA-11511		a4m250000007xt6AAA	FAST	<input type="checkbox"/>	In Process	6/16/2020 6:30 AM
6 AA-11513		a4m250000007xt6AAA	FAST	<input type="checkbox"/>	In Process	6/16/2020 6:30 AM
7 AA-11514		a4m250000007xt1AAA	FAST	<input type="checkbox"/>	Approved	6/16/2020 6:30 AM

7. Once the Fiduciaries **Application Access Record** is opened, view the **Details** tab with the Fiduciaries information to determine validation. Cross check this information with VBMS. If the information matches approve the application, if not reject the application.

Related	Details
<p>Application Name FAST</p> <p>Firm Name POC Test Flrm3</p> <p>First Name FirmPOC2</p> <p>Tax Id 224356453</p> <p>Last Name UAT25</p> <p>Approval Status In Process</p> <p>Email Id test.uat25@fake.com</p> <p>Contact Phone Number (555) 555-5571</p> <p>Contact Contact</p> <p>Contact Street 139 Fake St.</p> <p>Account Account</p> <p>Contact City Chicago</p> <p>State IllInols</p> <p>Contact Zip Code 60673</p> <p>Preferred Method of Contact Email</p>	



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- Once the Fiduciaries **Application Access Record** has been validated or determined invalid. In the Related tab, click the “**FAST Application Access**” link. If you are **approving**, please proceed to steps 9-12. If you are **rejecting** an application click [here](#).

The screenshot shows the 'Application Access' page for record AA-11509. It features a 'Related' tab and a 'Details' tab. Under the 'Related' tab, there is an 'Approval History (2)' section with 'Approve' and 'Reject' buttons. Below this is a table with the following data:

Step Name	Date	Status	Assigned To
FAST Application Access	6/16/2020 6:30 AM	Pending	FAST User Request Queue
Approval Request Sub...	6/16/2020 6:30 AM	Submitted	Bethany Sharb

A 'View All' link is located at the bottom of the table.

- Click the **approve** button.

The screenshot shows the 'Application Access Approval' page for record AA-11509, which is in a 'Pending' state. At the top right, there are three buttons: 'Approve', 'Reject', and 'Reassign'. A red arrow points to the 'Approve' button. Below the buttons is a table with the following data:

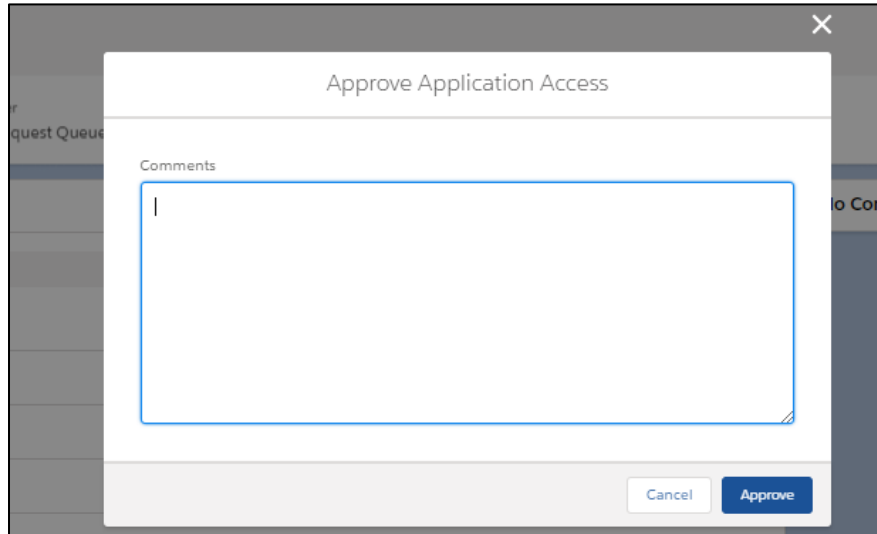
Submitter	Date Submitted	Actual Approver	Assigned To
Bethany Sharb	Jun 16, 2020	FAST User Request Queue	FAST User Request Queue

The page also includes a 'Details' section with 'Approval Details' and a 'No Comments' section.



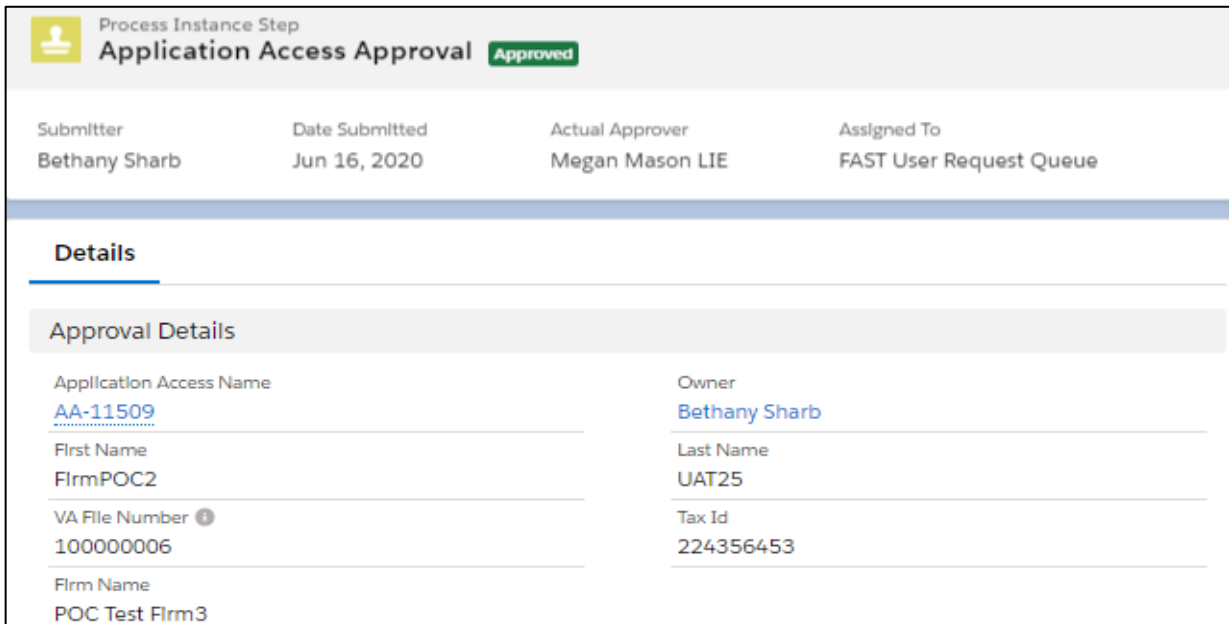
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10. In the comments field input any comments you have and then click the **approve**. Please note comments are not required.



The screenshot shows a modal dialog box titled "Approve Application Access". Inside the dialog, there is a text area labeled "Comments" with a vertical cursor. At the bottom right of the dialog, there are two buttons: "Cancel" and "Approve".

11. Once the application has been approved a green banner will appear. This approval will allow the Fiduciary access to FAST.



The screenshot displays a "Process Instance Step" for "Application Access Approval" with a green "Approved" status. Below this is a table with the following data:

Submitter	Date Submitted	Actual Approver	Assigned To
Bethany Sharb	Jun 16, 2020	Megan Mason LIE	FAST User Request Queue

Below the table is a "Details" section with "Approval Details":

Application Access Name	Owner
AA-11509	Bethany Sharb
First Name	Last Name
FirmPOC2	UAT25
VA File Number ⓘ	Tax Id
100000006	224356453
Firm Name	
POC Test Flrm3	

12. This will complete the approval process.



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13. Click the **reject** button.

Approval Request
Application Access Approval Pending

Approve Reject Reassign

Submitter	Date Submitted	Actual Approver	Assigned To
Bethany Sharb	Jun 16, 2020	FAST User Request Queue	FAST User Request Queue

Details

No Comments

Approval Details

Application Access Name	Owner
AA-11509	Bethany Sharb
First Name	Last Name
FirmPOC2	UAT25
VA File Number ⓘ	Tax Id
100000006	224356453
Firm Name	
POC Test Firm3	

14. In the comments field input any comments you have and click **reject**. Please note comments are not required.

Reject Application Access


Comments

Cancel Reject



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15. Once the application has been rejected a red banner will appear.

 Process Instance Step
Application Access Approval Rejected

Submitter	Date Submitted	Actual Approver	Assigned To
Bethany Sharb	Jun 16, 2020	Megan Mason LIE	FAST User Request Queue

Details

Approval Details

Application Access Name AA-11522	Owner Bethany Sharb
First Name Individual7	Last Name UAT12
VA File Number ⓘ 100000003	Tax Id
Firm Name	

16. If an application is rejected the Fiduciary will be unable to gain access to FAST, they can re-register for reconsideration.

Important

After 48 hours if a FIRM fails to review the application access request in their queue, it will be moved into the supervisors/superusers que for review.

Outcome

If approved the Fiduciary will be able to gain access to the FAST system.

