

Fiduciary Accountings Submission Tool (FAST) Training Job Aid Fiduciary Fund Usage Reviews (View and Assign)



Objective

To provide the Supervisor with steps on how to view a Fiduciary Fund Usage Review.



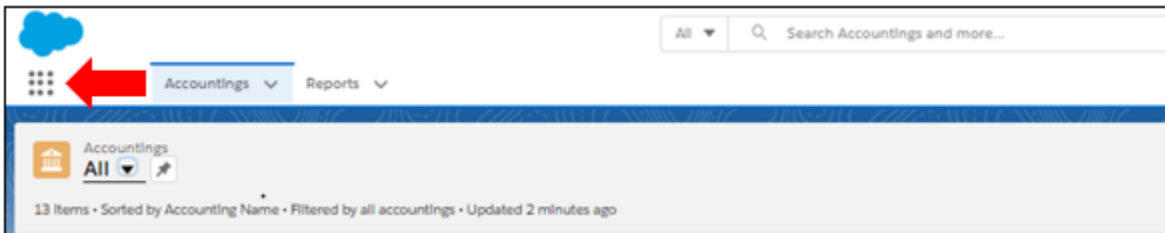
Audience

User: Supervisor

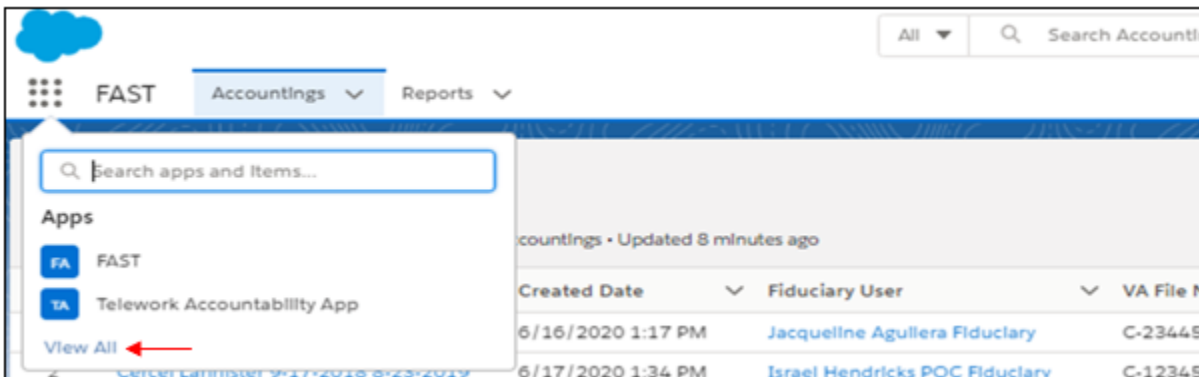
Instructions

Log into **Salesforce**

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

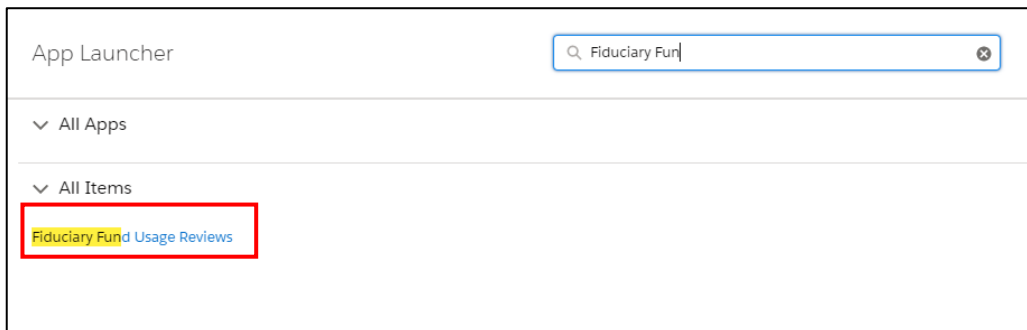


2. Then click the **View All** button.



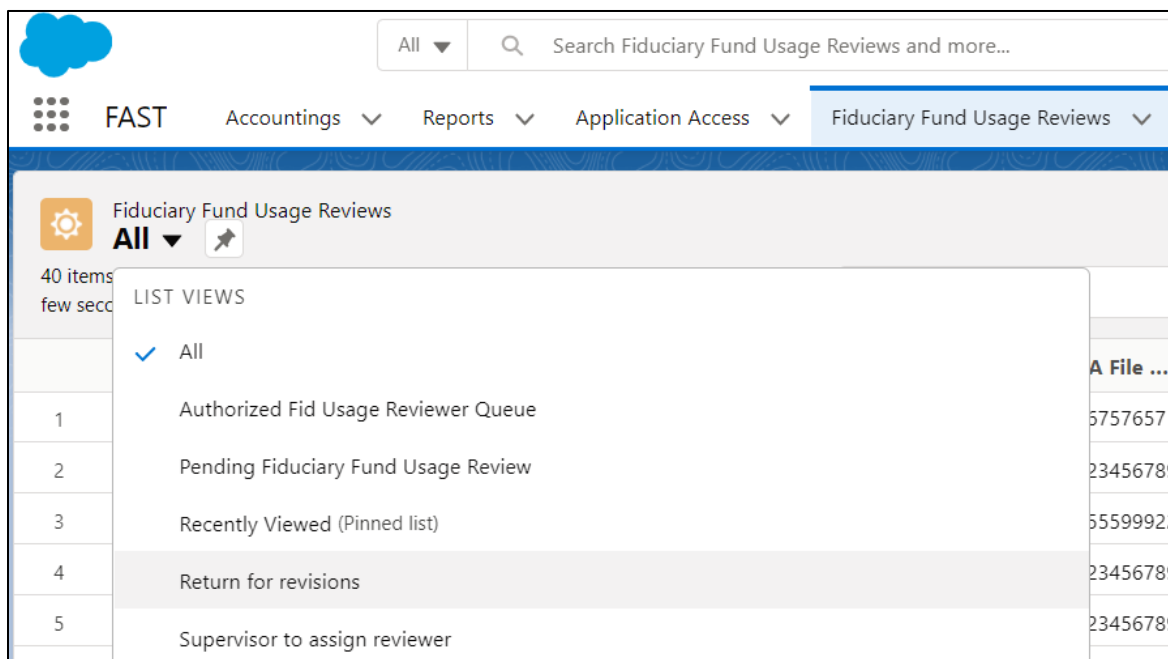
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3. In the search box type **Fiduciary Fund Usage Reviews**, then click the option to open the tab.



4. Within the **Fiduciary Fund Usage Reviews** tab click the **list view** drop down arrow to determine which list view you'd like to choose. There are **six** list view options.

- All
- FAST Authorized Fid Usage Reviewer Queue
- Pending Fiduciary Fund Usage Review
- Recently Viewed
- Return for revision
- Supervisor to assign reviewer

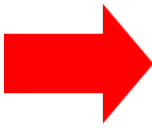


Fiduciary Accountings Submission Tool (FAST)

Training Job Aid

Fiduciary Fund Usage Reviews (View and Assign)

- To review a Fiduciary Fund Usage Review record, click the **name** of the **Fiduciary Fund Usage Review**.



Fiduciary Fund Usage Reviews				
All				
28 items • Sorted by Created Date • Filtered by All fiduciary fund usage reviews • Updated 19 minutes ago				
	Fiduciary Fund Usage Review ...	Status	Created Date ↓	VA Fiduciary Hub
1	Training 1-5-2021 4-5-2021	Revisions Submitted	6/1/2021 9:22 AM	Columbia 319
2	Training 1-5-2021 4-5-2021	Incomplete	5/28/2021 3:02 PM	Louisville 327
3	Demo 1-5-2021 4-5-2021	Submitted	5/28/2021 3:01 PM	Columbia 319
4	Demo 1-5-2021 4-21-2021	Draft	5/28/2021 3:00 PM	Indianapolis 326
5	Dest 5-4-2021 5-20-2021	Incomplete	5/28/2021 1:41 PM	Milwaukee 330
6	Chuck 5-3-2021 5-21-2021	Complete	5/28/2021 1:38 PM	Indianapolis 326
7	Sys 5-6-2021 5-20-2021	Under Review	5/28/2021 1:37 PM	Milwaukee 330

- Once in the **Fiduciary Fund Usage Review** record there are **three** sections to review:
 - General Information-** Fiduciary Fund Usage Review Name, Name of Fiduciary, VA Fiduciary Hub, Starting Date, Ending Date, Signature of the Fiduciary, Submitted Date, First Name of Veteran, Middle Name of Veteran, Last Name of Veteran, VA File Number, First Name of Beneficiary, and Last Name of Beneficiary.
 - Review Information-** Reviewer, Surety Bond, Court Documents, Additional Bonds Purchase, Saving Bonds Cashed, Status, Disposition, Reason for Incomplete, Revisions Requested, and Additional Remarks.
 - Reporting Fields-** Returned Date, Revisions Submitted Date, Fiduciary Return Count, Fiduciary Contact, Created By, Completed Date, Incomplete Date, Number of Days to Complete, Number of Days to Incomplete, Owner(List view name), and Last Modified.

The **Review information** section is the only section that can be edited by and LIE. As a reviewer the LIE can edit/update the surety bond, court documents, additional bonds purchased, and savings bonds cashed fields.




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General Information Viewpoint

General Request Information	
Fiduciary Fund Usage Review Name Demo 1-5-2021 4-5-2021	First Name of Veteran Demo
Name of Fiduciary Forrest Gump	Middle Name of Veteran
VA Fiduciary Hub Columbia 319	Last Name of Veteran Training
Starting Date 1/5/2021	VA File Number 123456789
Ending Date 4/5/2021	First Name of Beneficiary Demo
Signature of the Fiduciary m	Last Name of Beneficiary Training
Submitted Date 6/1/2021	




Review Information Viewpoint

Review Information	
Reviewer  Tracy Barker LIE User 1	Status Under Review
Surety Bond Outstanding? <input type="checkbox"/>	Disposition
Court Documents Outstanding? <input type="checkbox"/>	Reason for Incomplete
Additional Bonds Purchased? <input type="checkbox"/>	Revisions Requested
Savings Bonds Cashied? <input type="checkbox"/>	Additional Remarks



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Reporting Fields Viewpoint

Reporting Fields	
Returned Date	Completed Date
Revisions Submitted Date	Date Incomplete
Fiduciary Return Count 0	Number of Days to Complete
Fiduciary Contact Forrest Gump	Number of Days to Incomplete
Created By  Forrest Gump , 5/28/2021 3:01 PM	Owner FAST Authorized Fid Usage Reviewer Queue 
	Last Modified By  Tracy Barker LIE User 1 , 6/2/2021 2:12 PM

Outcome

The Supervisor has viewed Fiduciary Fund Usage Review.

