

Objective

To provide the Supervisor with steps on how to assign Fiduciary Fund Usage Reviews to LIE.



Audience

User: Supervisor

Prerequisite

The Fiduciary has submitted a Fiduciary Fund Usage Review.

Instructions

Log into Salesforce

1. <u>Click</u> the Apps icon at the top left of the homepage screen.

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Accountings V Reports V						
Accountings AII AII AII AII AII AII AII AII						

2. Then <u>click</u> the View All button.

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		FAST	Accountings	 Reports 	~					
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	FA TA	FAST Telework A	ccountability App	2		Created Date	\sim	Fiduciary User	~	VA File N
	Vle	w All 🚽				6/16/2020 1:17 PM		Jacqueline Aguilera Fiduciary		C-23445
L,	4	Cercerta	minister 9-17-201	0 0.23.2019		6/17/2020 1:34 PM		Israel Hendricks POC Fiduciary		C-12345

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

App Launcher	Q Fiduciary Fun	0
✓ All Apps		
✓ All Items Fiduciary Fund Usage Reviews		

4. Once in the Fiduciary Fund Usage Reviews tab, <u>click</u> the list view option '**Supervisor to** assign reviewer'.

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	FAST Accountings V Reports V	Application Access 🗸	Potential Fiduciary Applications	Fiduciary F	und Usage Reviews 🗸 🗸
5 item	Fiduciary Fund Usage Reviews Supervisor to assign reviewer			- Jisi (<i>111</i>	
Review	LIST VIEWS		туре,	Q Search th	is list
	All			∽ Fiduc ∨	🗸 VA Fiduciary Hub 🗸
1	FAST Authorized Fid Usage Reviewer Q	ueue	D PM	0	Indianapolis 326
2	Pending Fiduciary Fund Usage Review		PM	0	Lincoln 334
3	Recently Viewed (Pinned list)		PM	0	Louisville 327
4	Return for revisions		08 PM	0	Columbia 319
5	 Supervisor to assign reviewer 		PM	0	Columbia 319

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5. Within the list view **Supervisor to assign reviewer** you can reassign a single or multiple Fiduciary Fund Usage Reviews to a reviewer.

For **single reassignment** <u>click</u> the box next to the name of the Fid Fund Usage Reviews you'd like to assign to the reviewer. Under the **Reviewer** column click on pencil icon to search the name of the reviewer you'd like to assign. Then click **Save**.

Fiduciary Fund Usage Reviews Supervisor to assign reviewer 1 item selected									
	-	Fiduciary Fund Usage Revi 🕇 🗸	Status	\sim	Reviewer	\sim	Created Date		
1		Demo 1-5-2021 4-21-2021	Submitted	_			5/28/2021 3:00 PM		
2		Good 2-2-2021 5-2-2021	Submitted			1	6/2/2021 2:58 PM		
3		John 12-24-2020 3-24-2021	Submitted	2			6/2/2021 2:55 PM		
4		John 2-10-2021 5-10-2021	Submitted				5/28/2021 12:08 PM		
5		Training 1-5-2021 4-5-2021	Submitted				6/2/2021 2:53 PM		
4									
							Cancel Save		

For **multiple reassignments** <u>click</u> the box next to the column for **Fiduciary Fund Usage Reviews** to assign to the reviewer. This selection will mark all the Fiduciary Fund Usage Reviews in the que. You can also individually select multiple Fiduciary Fund Usage Reviews by selecting the boxes next to the name of the Fiduciary Fund Usage Reviews.

Under the **Reviewer** column click on pencil icon to search the name of the reviewer you'd like to assign. Under the reviewer's name **check the box and hit apply** if those are the number of items you've chosen to reassign. Click the checkbox to confirm you want to assign the multiple Fiduciary Fund Usage Reviews. Then click **Save**.

Please see images below

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Click box to select all

1	Fiduciary Fund Usage Revi ↑ ∨ Demo 1-5-2021 4-21-2021	Status V	1	 ✓ 	Fiduciary Fund Usage Revi ↑ ∨	Status	\sim
1	Demo 1-5-2021 4-21-2021	Submitted	1				
1	Demo 1-3-2021 4-21-2021	Jubililleu	1		Demo 1-5-2021 4-21-2021	Submitted	
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2	Good 2-2-2021 5-2-2021	Submitted	2		John 12-24-2020 3-24-2021	Submitted	
3	John 12-24-2020 3-24-2021	Submitted	3	*	50111 12-24-2020 5-24-2021	Submitted	
	1 1 2 40 2024 5 40 2024	C 1 10 1	4	✓	John 2-10-2021 5-10-2021	Submitted	
4	John 2-10-2021 5-10-2021	Submitted	5	~	Training 1-5-2021 4-5-2021	Submitted	
5	Training 1-5-2021 4-5-2021	Submitted					

Fiduciary Fund Usage Reviews Supervisor to assign reviewer 5 items selected										
	~	Fiduciary Fund Usage Revi 🕇 🗸	Status 🗸	Reviewer 🗸	Created Date	↓ Fic				
1	✓	Demo 1-5-2021 4-21-2021	Submitted	Tracy Barks	r I TE Llear 1					
2	✓	Good 2-2-2021 5-2-2021	Submitted							
3	✓	John 12-24-2020 3-24-2021	Submitted	✓ Update 5 sele	cted items					
4	✓	John 2-10-2021 5-10-2021	Submitted		Cancel	Apply				
5	~	Training 1-5-2021 4-5-2021	Submitted							
			Cancel	Save						

Outcome

The Supervisor has assigned the Fiduciary Fund Usage Review to desired LIE(s).

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