

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



Objective

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



Audience

User: Supervisor

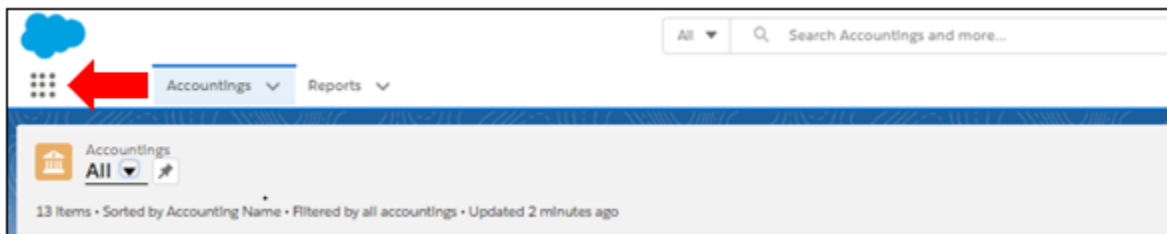
Prerequisite

The Fiduciary has submitted a Fiduciary Fund Usage Review.

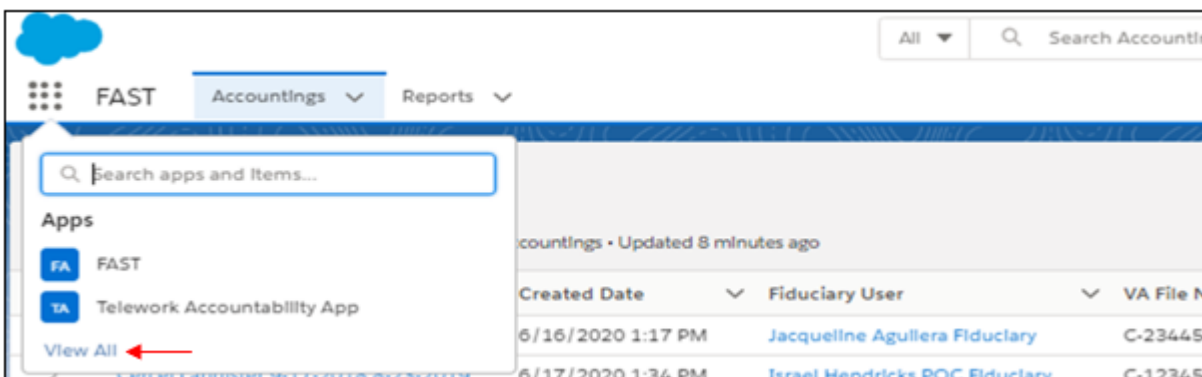
Instructions

Log into **Salesforce**

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

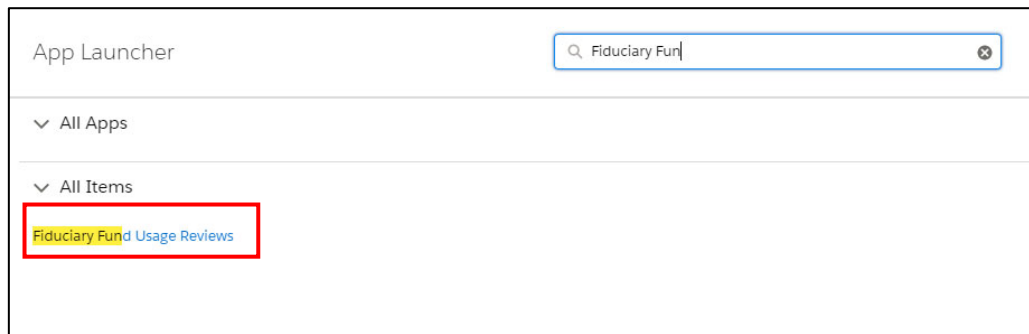


2. Then click the **View All** button.

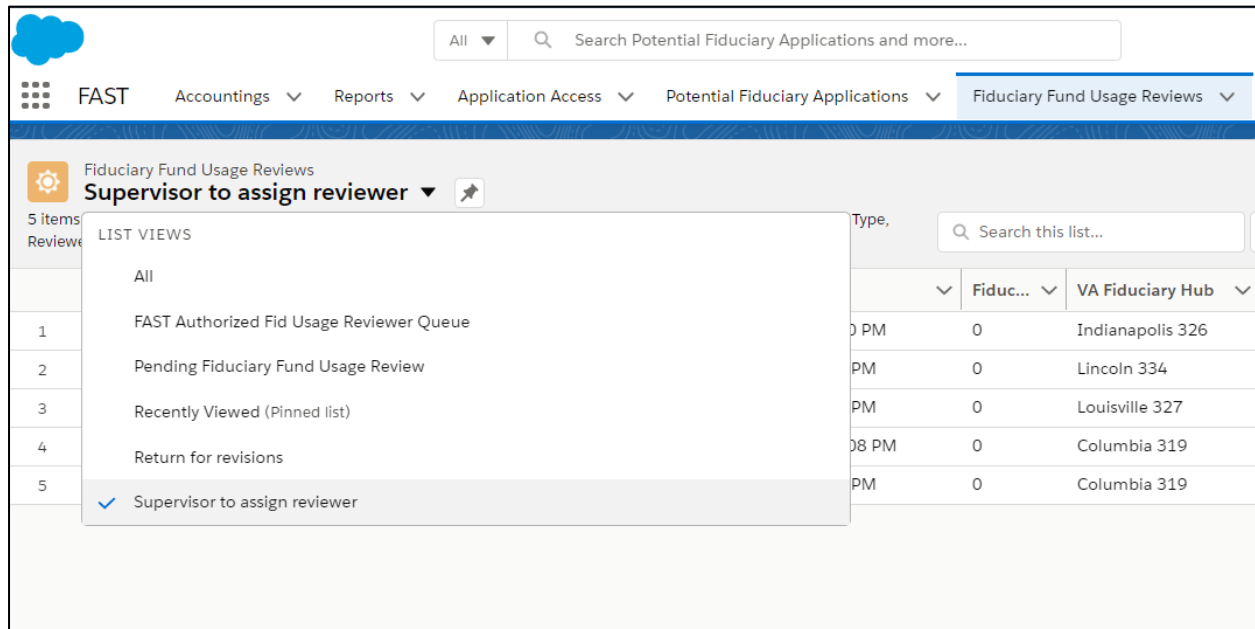


Fiduciary Accountings Submission Tool (FAST) Training Job Aid Fiduciary Fund Usage Reviews (Assign)

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



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



Fiduciary Accountings Submission Tool (FAST)

Training Job Aid

Fiduciary Fund Usage Reviews (Assign)

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** click 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**.

	<input type="checkbox"/>	Fiduciary Fund Usage Revi... ↑ ↓	Status ↓	Reviewer ↓	Created Date
1	<input type="checkbox"/>	Demo 1-5-2021 4-21-2021	Submitted		5/28/2021 3:00 PM
2	<input checked="" type="checkbox"/>	Good 2-2-2021 5-2-2021	Submitted		6/2/2021 2:58 PM
3	<input type="checkbox"/>	John 12-24-2020 3-24-2021	Submitted		6/2/2021 2:55 PM
4	<input type="checkbox"/>	John 2-10-2021 5-10-2021	Submitted		5/28/2021 12:08 PM
5	<input type="checkbox"/>	Training 1-5-2021 4-5-2021	Submitted		6/2/2021 2:53 PM

1 item selected

Cancel Save

For **multiple reassignments** click 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



Fiduciary Accountings Submission Tool (FAST)

Training Job Aid

Fiduciary Fund Usage Reviews (Assign)

Click box to select all

	<input type="checkbox"/>	Fiduciary Fund Usage Revi...	↑ ↓	Status	↓
1	<input type="checkbox"/>	Demo 1-5-2021 4-21-2021		Submitted	
2	<input type="checkbox"/>	Good 2-2-2021 5-2-2021		Submitted	
3	<input type="checkbox"/>	John 12-24-2020 3-24-2021		Submitted	
4	<input type="checkbox"/>	John 2-10-2021 5-10-2021		Submitted	
5	<input type="checkbox"/>	Training 1-5-2021 4-5-2021		Submitted	

	<input checked="" type="checkbox"/>	Fiduciary Fund Usage Revi...	↑ ↓	Status	↓	Reviewer	Created Date	↓	Fi
1	<input checked="" type="checkbox"/>	Demo 1-5-2021 4-21-2021		Submitted					
2	<input checked="" type="checkbox"/>	Good 2-2-2021 5-2-2021		Submitted					
3	<input checked="" type="checkbox"/>	John 12-24-2020 3-24-2021		Submitted					
4	<input checked="" type="checkbox"/>	John 2-10-2021 5-10-2021		Submitted					
5	<input checked="" type="checkbox"/>	Training 1-5-2021 4-5-2021		Submitted					

Outcome

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

