

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



Objective

To provide the LIE with steps on how to complete a Fiduciary Fund Usage review in FAST after it has been submitted by a Fiduciary.



Audience

User: LIE

Prerequisite

The Fiduciary has submitted a Fiduciary Fund Usage Review and the LIE has determined the review is complete.

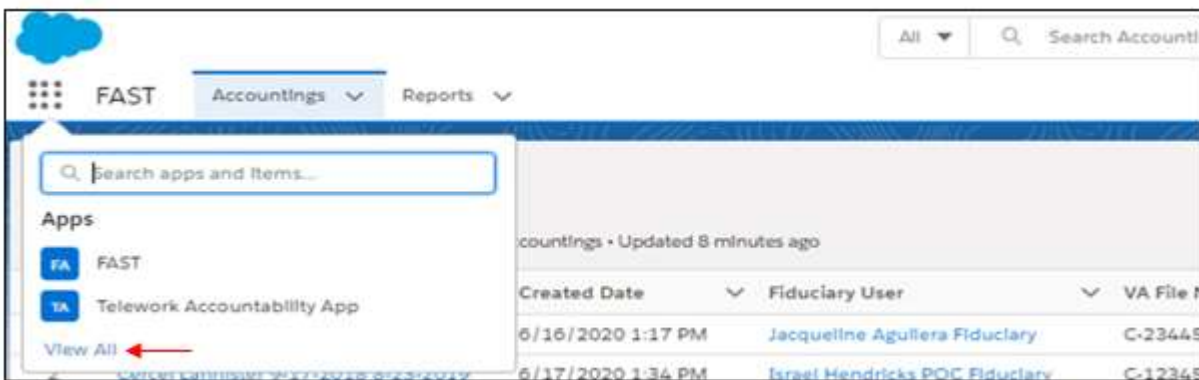
Instructions

Log into **Salesforce**

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

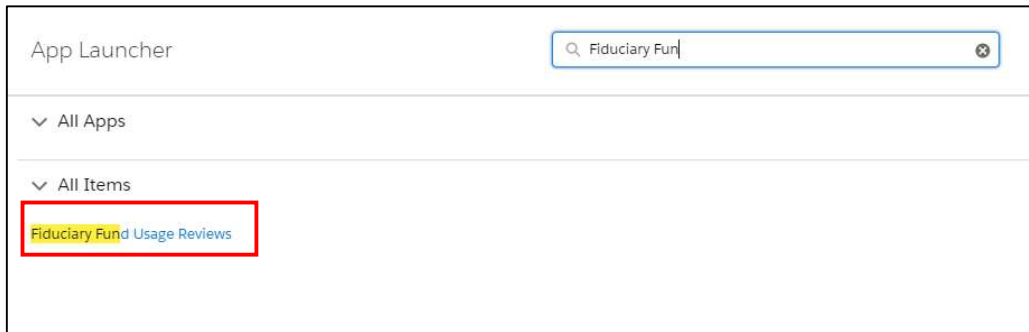


2. Then click the **View All** button.

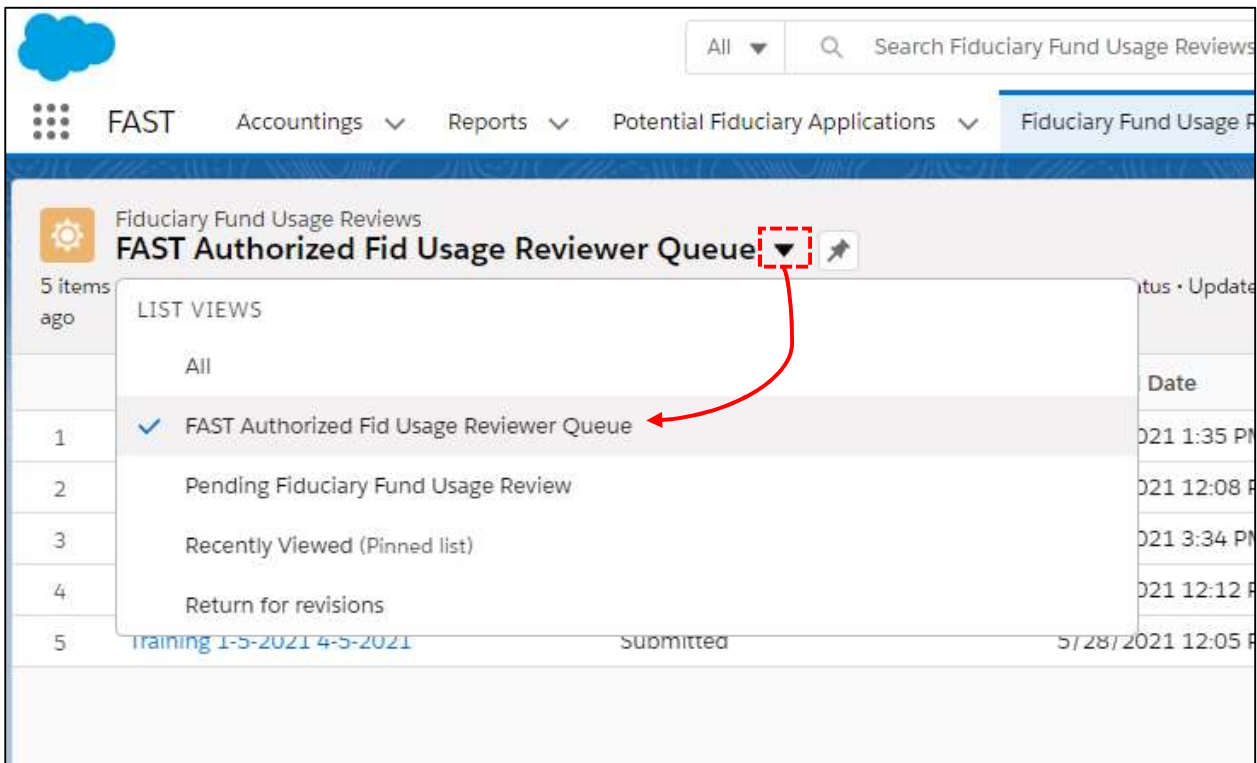


Fiduciary Accountings Submission Tool (FAST) Training Job Aid Fiduciary Fund Usage Reviews (Complete)

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



4. Click the **list view** drop down arrow and select '**FAST Authorized Fid Usage Reviewer Queue**'.



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


5. Click the name of the submitted **Fiduciary Fund Usage Review**.

	Fiduciary Fund Usage Review Name ↑	Status	Reviewer	Created Date	VA Fiduciary Hub	VA File Num...
1	Diana 5-1-2021 5-7-2021	Revisions Submitted	Barbara John...	5/26/2021 1:35 PM	Columbia 319	123456789
2	John 2-10-2021 5-10-2021	Submitted		5/28/2021 12:08 P...	Columbia 319	123456789
3	Mini 5-1-2021 5-14-2021	Submitted		5/21/2021 3:34 PM	Lincoln 334	123456789
4	Sara 11-9-2020 2-9-2021	Submitted		5/28/2021 12:12 P...	Lincoln 334	123456789
5	Training 1-5-2021 4-5-2021	Submitted		5/28/2021 12:05 P...	Indianapolis 326	123456789

6. Once in Fiduciary Fund Usage Review record, scroll to the **'Review Information'** section, select **Reviewer** (pencil icon). Click in the search box, input your name, and click the **Save**.

Fiduciary Fund Usage Review
Training 1-5-2021 4-5-2021

Review Information

Reviewer 

Surety Bond Outstanding?

Court Documents Outstanding?

Additional Bonds Purchased?

Savings Bonds Cashed?

Fiduciary Fund Usage Review
Training 1-5-2021 4-5-2021

Submitted Date
5/28/2021

Review Information

Reviewer

Status
Submitted

Surety Bond Outstanding?

Disposition

Court Documents Outstanding?

Reason for Incomplete

Additional Bonds Purchased?

Revisions Requested

Savings Bonds Cashed?

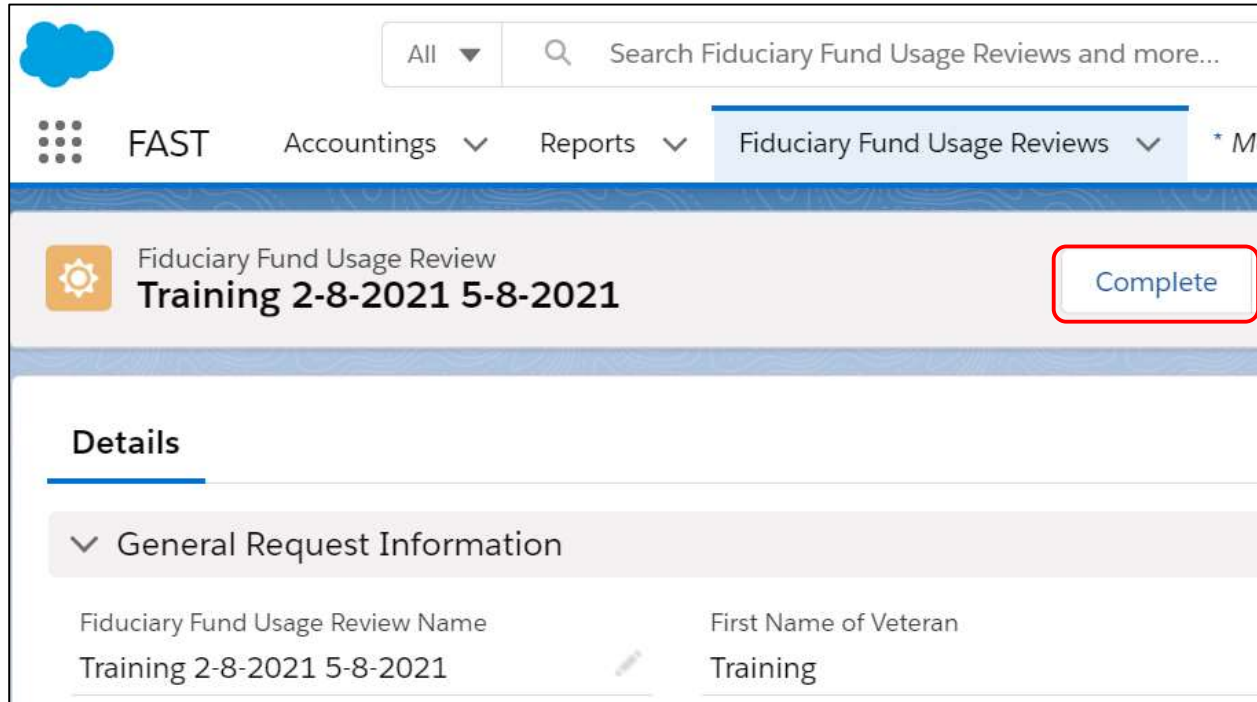
Additional Remarks

Cancel **Save**



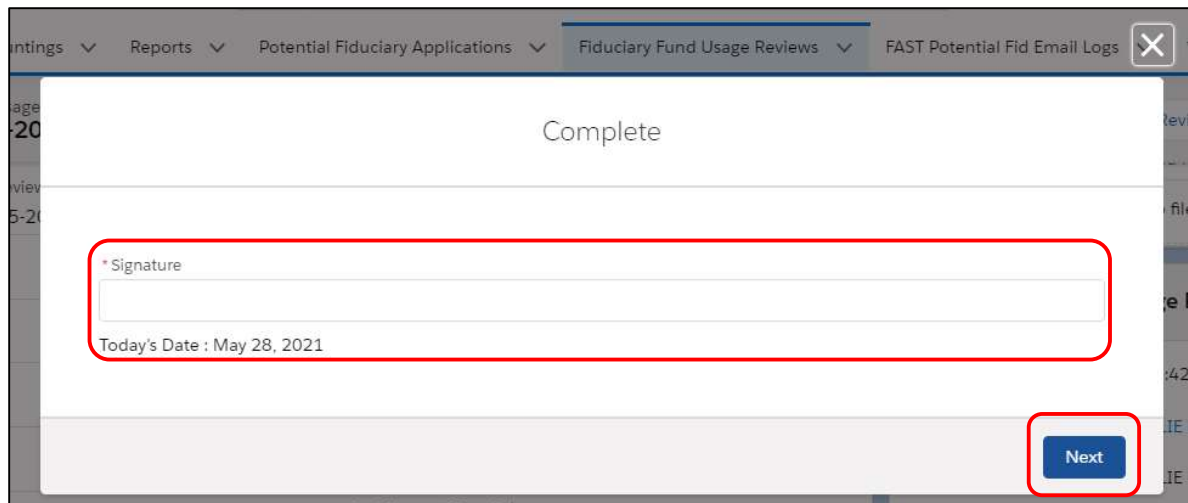
Fiduciary Accountings Submission Tool (FAST) Training Job Aid Fiduciary Fund Usage Reviews (Complete)

7. Click the **Complete** button at the top right of screen.



The screenshot shows the FAST web application interface. At the top, there is a search bar with the text "Search Fiduciary Fund Usage Reviews and more...". Below the search bar, the navigation menu includes "FAST", "Accountings", "Reports", and "Fiduciary Fund Usage Reviews". The main content area displays a "Fiduciary Fund Usage Review" for "Training 2-8-2021 5-8-2021". A red box highlights the "Complete" button in the top right corner. Below this, there is a "Details" section with a "General Request Information" subsection. The details include "Fiduciary Fund Usage Review Name" (Training 2-8-2021 5-8-2021) and "First Name of Veteran" (Training).

8. Input your signature in the **'Signature'** field and click the **Next**.

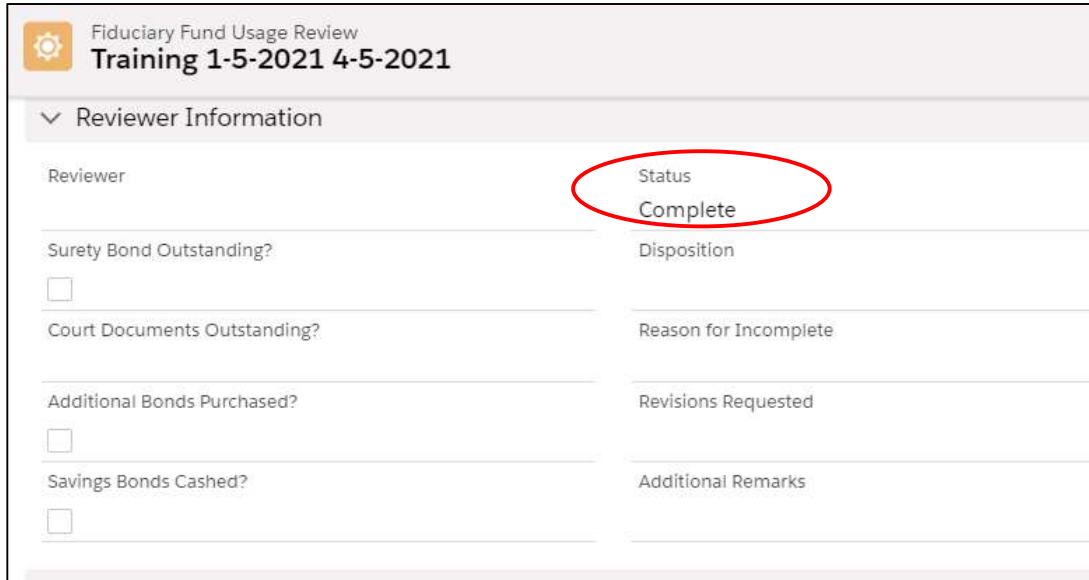


The screenshot shows the "Complete" screen in the FAST application. The word "Complete" is centered at the top. Below it, there is a "Signature" field with a red box around it. Underneath the signature field, it says "Today's Date : May 28, 2021". In the bottom right corner, there is a blue "Next" button with a red box around it.



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

9. Once the review is completed, the status field will change to **Complete**.



The screenshot shows a web form titled "Fiduciary Fund Usage Review" with a sub-header "Training 1-5-2021 4-5-2021". Below the title is a section labeled "Reviewer Information" with a dropdown arrow. The form contains several fields:

Reviewer	Status Complete
Surety Bond Outstanding? <input type="checkbox"/>	Disposition
Court Documents Outstanding?	Reason for Incomplete
Additional Bonds Purchased? <input type="checkbox"/>	Revisions Requested
Savings Bonds Cashed? <input type="checkbox"/>	Additional Remarks

The "Status" field is circled in red, indicating it is the focus of the instruction.

Outcome

The LIE has completed the Fiduciary Fund Usage Review. Once a Fiduciary Fund Usage Review has been complete, an email notification will be sent to the Fiduciary.

