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

Objective

To provide the LIE with steps on how to incomplete a Fiduciary Fund Usage Review after it has been submitted by a Fiduciary.

Audience

User: LIE

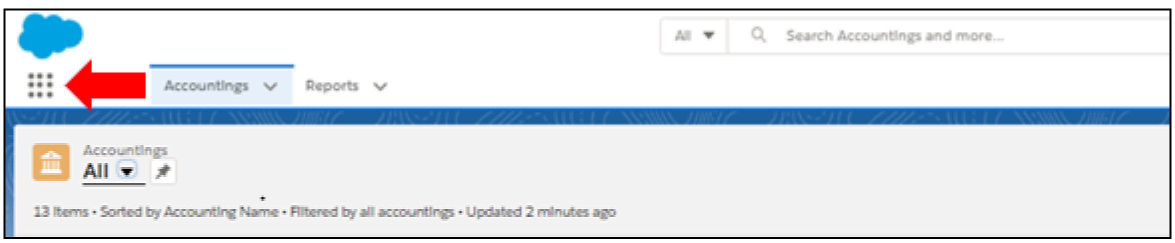
Prerequisite

The LIE has reviewed the Fiduciary Fund Usage Review and determined it’s incomplete.

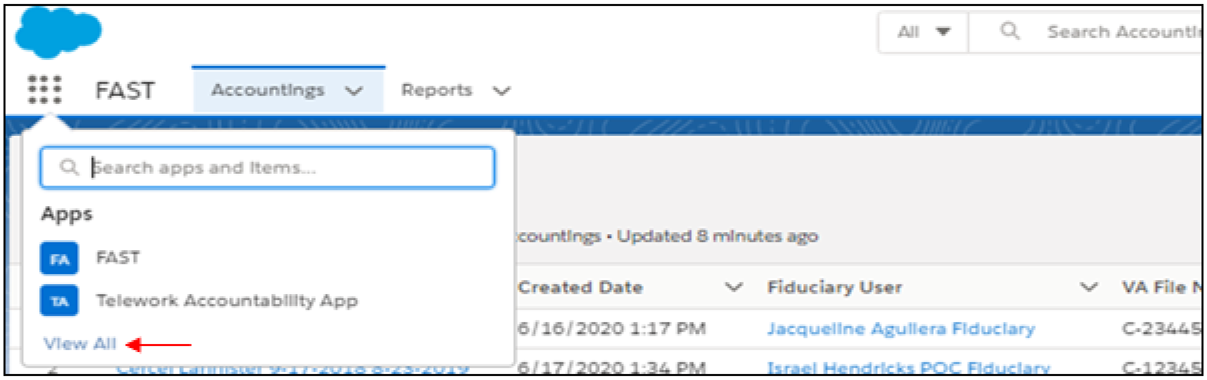
Instructions

Log into **Salesforce**

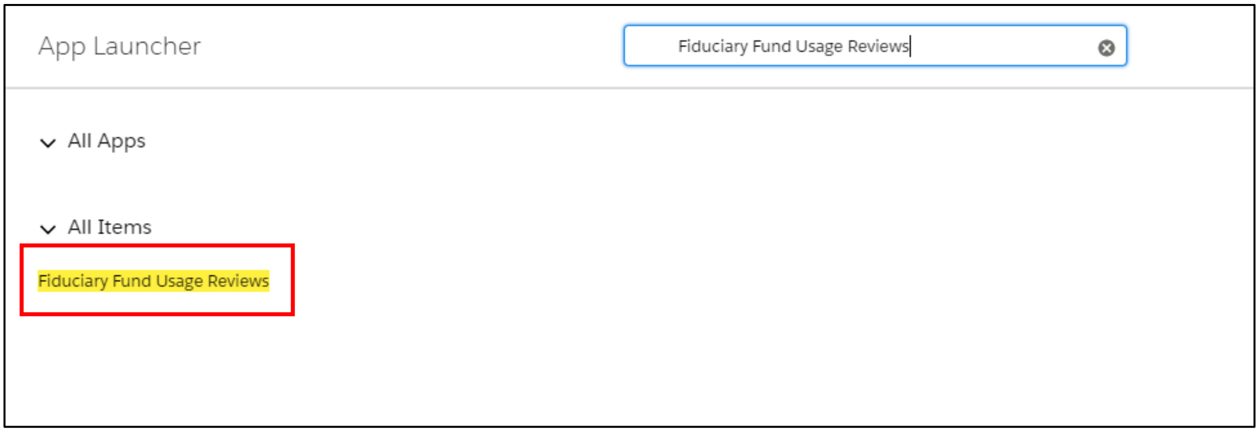
1. Click the **Apps** icon at the top left of the homepage screen.



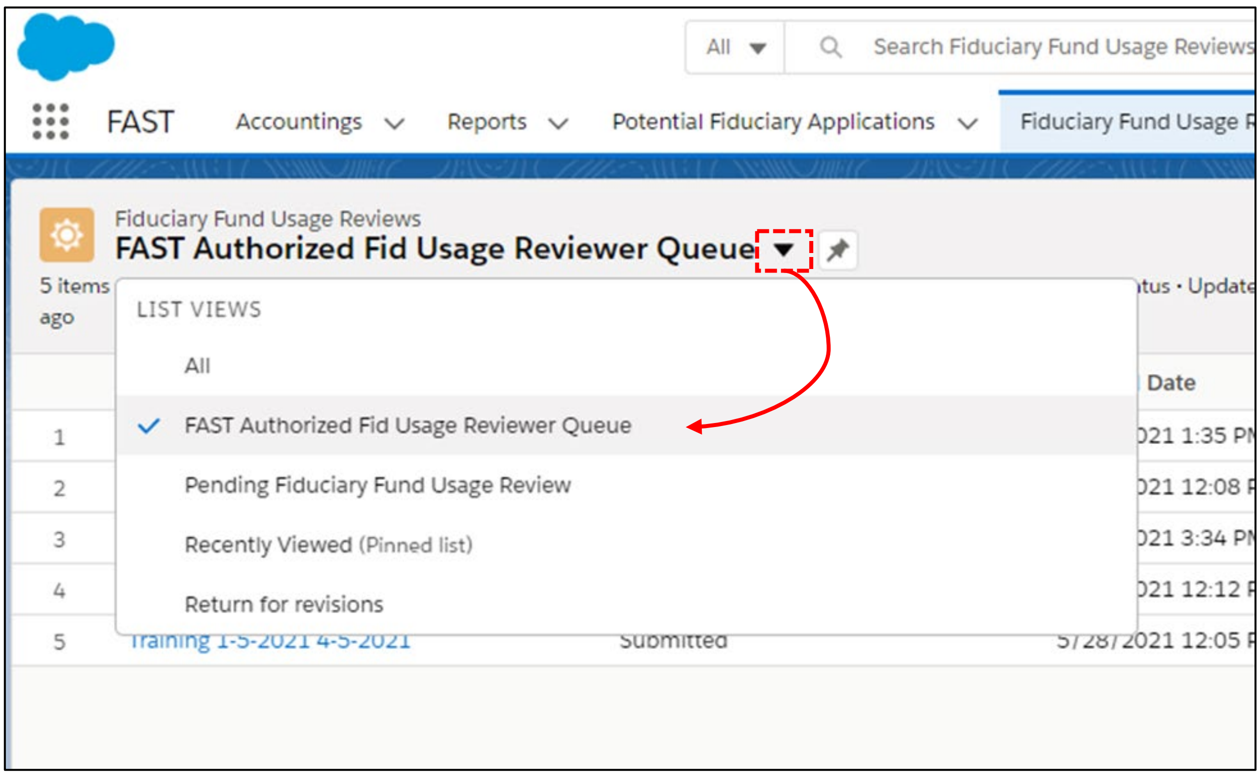
2. Then click the **View All** button.



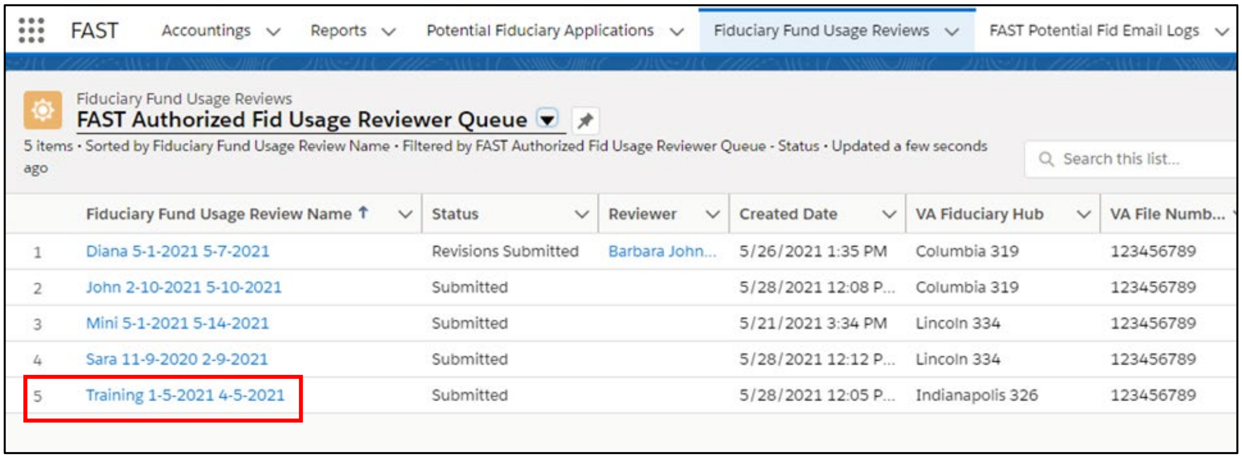
3. Next, in the search box type **"Fiduciary Fund Usage Reviews"** then click the option to open the tab.



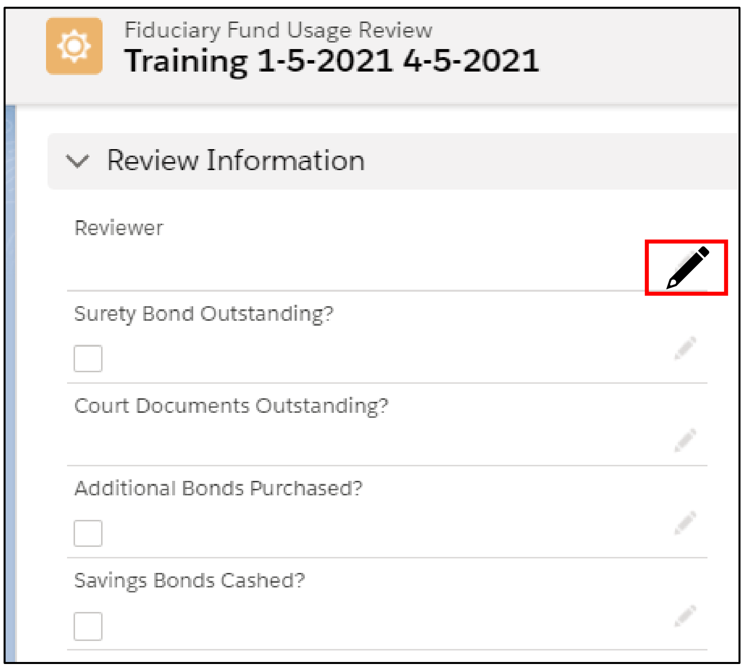
4. Click the **list view** drop down arrow and select **'FAST Authorized Fid Usage Reviewer Queue'**.

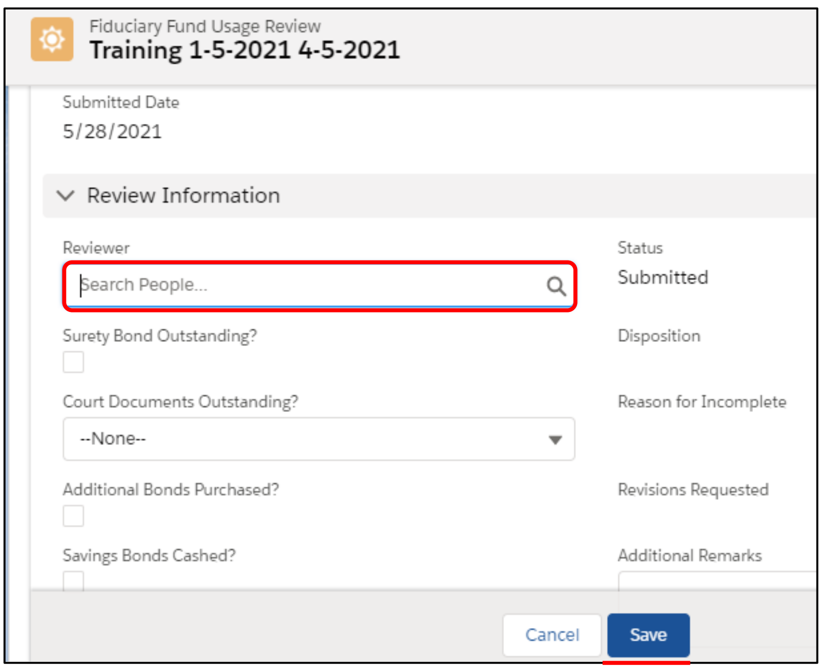


5. Click on the name of the **submitted** Fiduciary Fund Usage Review.

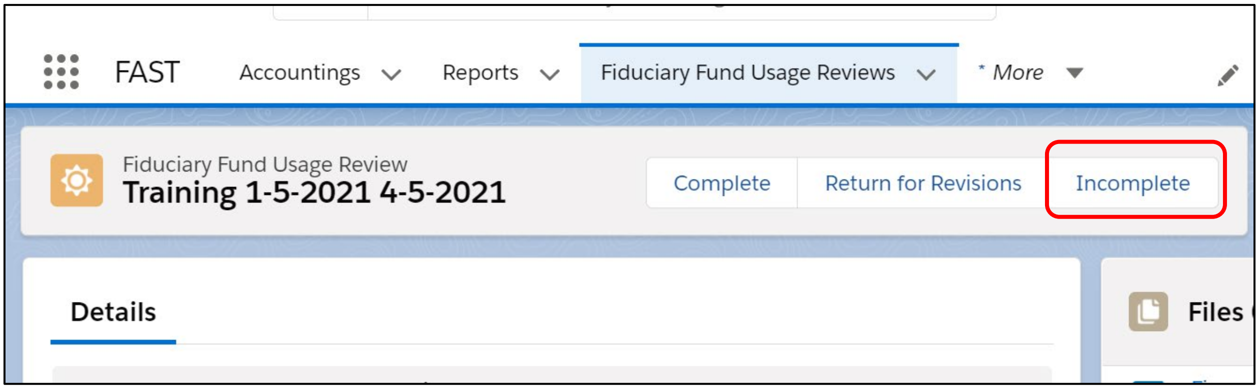


6. Within the **Fiduciary Fund Usage Review** record scroll down to the **'Reviewer'** field, click the edit button (pencil icon), input your name, and click **Save**.



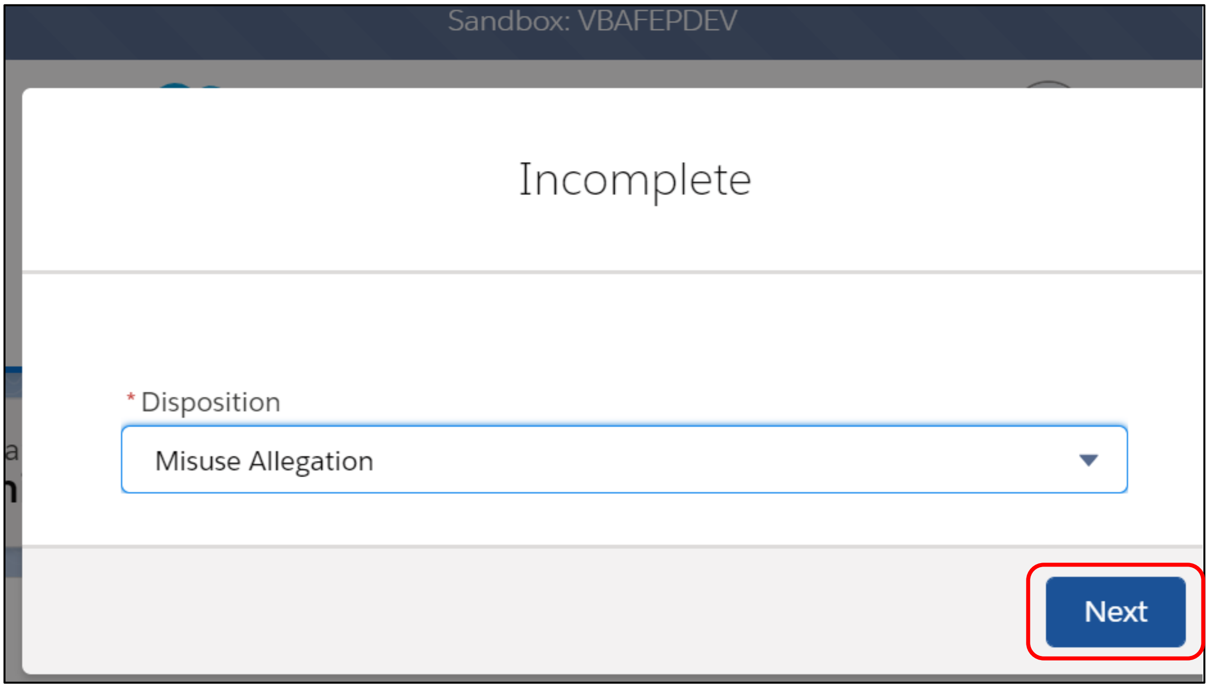


7. As the **Reviewer** on the top right of the screen click the **Incomplete** button.

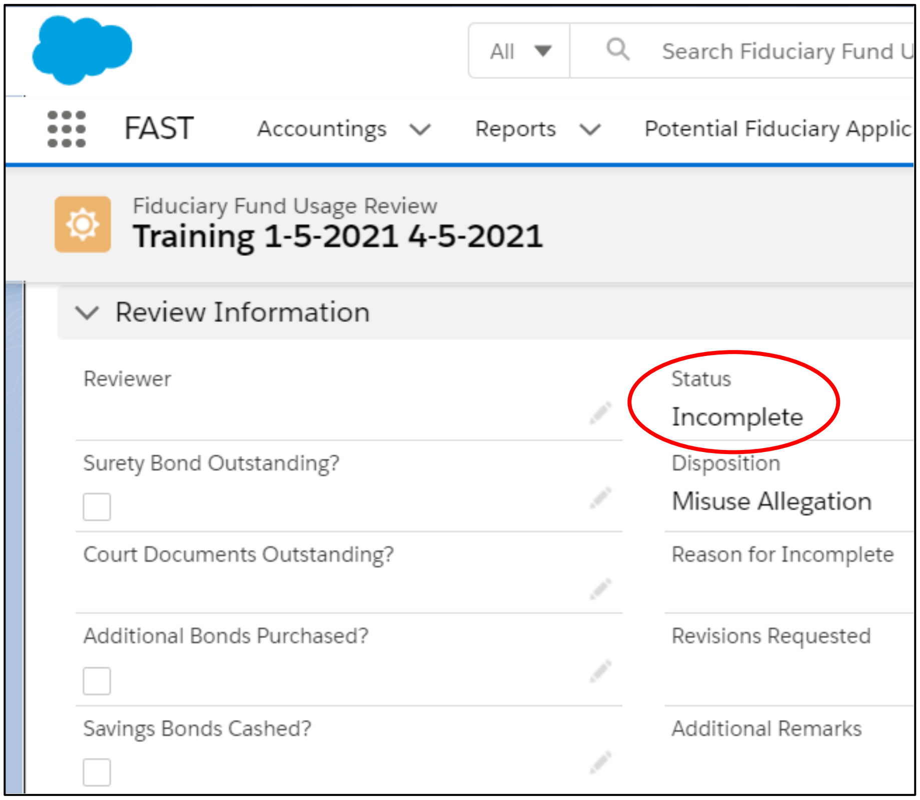


8. Click the **dropdown** to select the disposition for the incomplete Fiduciary Fund Usage Review. There are **three** categories:

- **Misuse Allegation**
- **Follow-up field examination EP 590**
- **Other (This is a free text option with up to 255 characters)**



9. The status field will change to **Incomplete**.



Outcome

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