

#### Objective

To provide the LIE with steps on how to return a Fid Fund Usage Review to Fiduciary that require revisions.



### Audience

User: LIE

### Prerequisite

The LIE has reviewed the Fid Fund Usage Review and noted there are errors that need to be revised.

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

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Telework Accountability App	Created Date 🗸 Fiduciary U	lser 🗸 🗸	VA File N
View All	6/16/2020 1:17 PM Jacqueline 6/17/2020 1:34 PM Israel Hend	Aguilera Fiduciary	C-23445 C-12345

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

App Launcher	Fiduciary Fund Usage Reviews	8
✓ All Apps		
✓ All Items Fiduciary Fund Usage Reviews		

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

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***	FAST Accountings V Reports V Potential Fiduciary Applications V Fiducia	ry Fund Usage F
Ø	Fiduciary Fund Usage Reviews FAST Authorized Fid Usage Reviewer Queue	-540677 NSW
5 item ago	LIST VIEWS	tus • Update
	All	Date
1	✓ FAST Authorized Fid Usage Reviewer Queue	021 1:35 PM
2	Pending Fiduciary Fund Usage Review	021 12:08 F
3	Recently Viewed (Pinned list)	021 3:34 PM
4	Return for revisions	021 12:12 F
5	Training 1-5-2021 4-5-2021 Submitted 5/2	872021 12:05 F

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#### 5. <u>Click</u> on the name of the **submitted** Fiduciary Fund Usage Review.

••••	FAST Accountings V Reports V	Potential Fiduciary App	lications 🗸 Fi	duciary Fund Usage Revi	ews 🗸 FAST	Potential	Fid Email Logs 🗸
(¢)	Fiduciary Fund Usage Reviews FAST Authorized Fid Usage Review	wer Queue 💌 🖈		Duque Status - Hedated a	fourseconds		SHG LA MININ
ago	ns • Sorted by Fiduciary rund Usage Review Name • Fi	tered by PAST Authorized P	nd Osage Reviewer G	Queue - Status - Opdated a	tew seconds	Q Sear	ch this list
	Fiduciary Fund Usage Review Name 🕇 🛛 🗸	Status 🗸	Reviewer 🗸	Created Date 🗸 🗸	VA Fiduciary H	ub 🗸	VA File Numb
1	Diana 5-1-2021 5-7-2021	Barbara John	5/26/2021 1:35 PM	Columbia 319		123456789	
2	John 2-10-2021 5-10-2021		5/28/2021 12:08 P	Columbia 319		123456789	
3	Mini 5-1-2021 5-14-2021	i 5-1-2021 5-14-2021 Submitted			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 32	26	123456789

6. Once in the **Fiduciary Fund Usage Review** record go to the 'Reviewer' field, click the edit button (pencil icon), and input your name as the reviewer. Then <u>click</u> **Save**.

Fiduciary Fund Usage Review Training 1-5-2021 4-5-2021	Fiduciary Fund Usage Review Training 1-5-2021 4-5-2021	
	Submitted Date	
✓ Review Information	5/28/2021	
	✓ Review Information	
Reviewer	Beviewer	Status
	Search People Q	Submitted
Surety Bond Outstanding?	Surety Bond Outstanding?	Disposition
Court Documents Outstanding?	Court Documents Outstanding?	Reason for Incomplete
/	None	
Additional Bonds Purchased?	Additional Bonds Purchased?	Revisions Requested
Savings Bonds Cashed?	Savings Bonds Cashed?	Additional Remarks
	Cancel	Save



#### 7. As the Reviewer on the top right of the screen click the **Return for Revisions** button.

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\$	Fiduciary <b>Trainin</b>	Fund Usage Review 1 <b>g 1-5-2021 4-5-2</b>	2021		Complete	Return for Revisions	Incomplete
De	etails					C File	s (0)
$\sim$	General F	Request Information	n				.↑. Upload Files
Fic Tra	luciary Fund aining 1-5-2	Usage Review Name 2021 4-5-2021	1	First Name of Veteran Training			Or drop files

Type the reason for the revision(s) in comment box. There is a 255-character limit in the comment box. If the reason exceeds 255 characters, the revisions request will not send. Then <u>click</u> Save.

		All 🔻	Q. Search Fiduciary F	fund Usage Reviews and mo	re		*
Accountings	🗸 Reports 🗸	Potential F	iduciary Applications 🗸	Fiduciary Fund Usage Re	eviews 🗸 FAST	Potential Fid Email Logs 💊	✓ * Contacts ∨ >
ary Fund Usage Revie a 1-4-2021 3-9	-2021					Accepted	Kurn for Revisions
Information			Ret	urn for Revisions			igs and tasks mar
Storley Internal	* Revisions Reque	sted					∽ ⊥p here.
Outstanding?	Need more do	cumentation	from the Fiduciary.				
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lands Purchased?						Cancel Save	
ds Cashed?		1					

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9. After you <u>click</u> **save**. The status field will change to **Revisions Requested** and the request will appear as seen below.

► FAST Accountings ∨ Reports ∨	Fiduciary Fund Usage Reviews 🗸 * M
Fiduciary Fund Usage Review Training 1-5-2021 4-5-2021	Complete
Reviewer	Status
Tracy Barker LIE User 1	Revisions Requested
Surety Bond Outstanding?	Disposition
Court Documents Outstanding?	Reason for Incomplete
Additional Bonds Purchased?	Revisions Requested
	Missing financial statement from the month of February.

#### Outcome

The LIE has sent revisions to the Fiduciary. The Fiduciary will be notified via email when the reviewer has requested revisions. Once revisions are completed by the Fiduciary, the LIE can continue with the review process.

