

Fiduciary Accountings Submission Tool (FAST) Training Job Aid Return for Revisions on Fiduciary Fund Usage Review



Objective

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



Audience

User: LIE

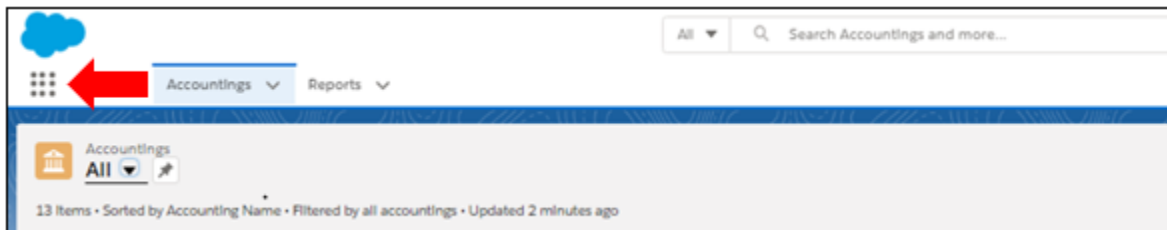
Prerequisite

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

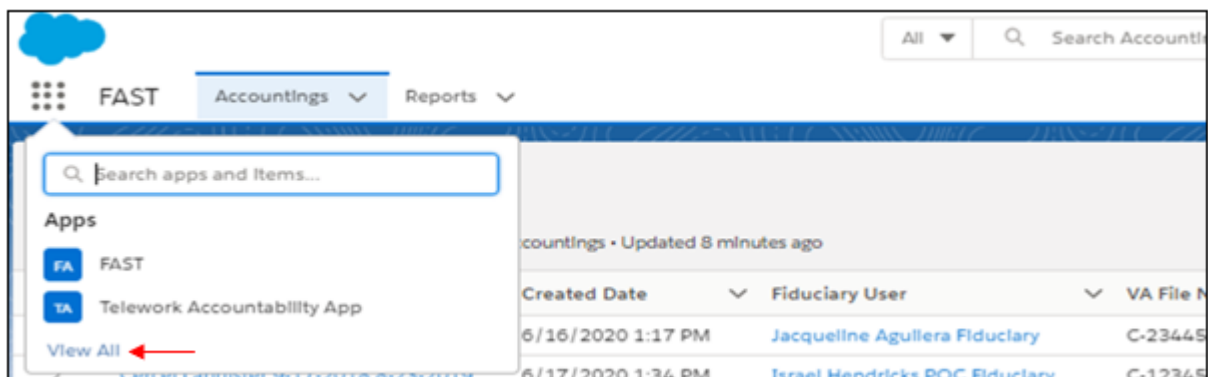
Instructions

Log into **Salesforce**

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

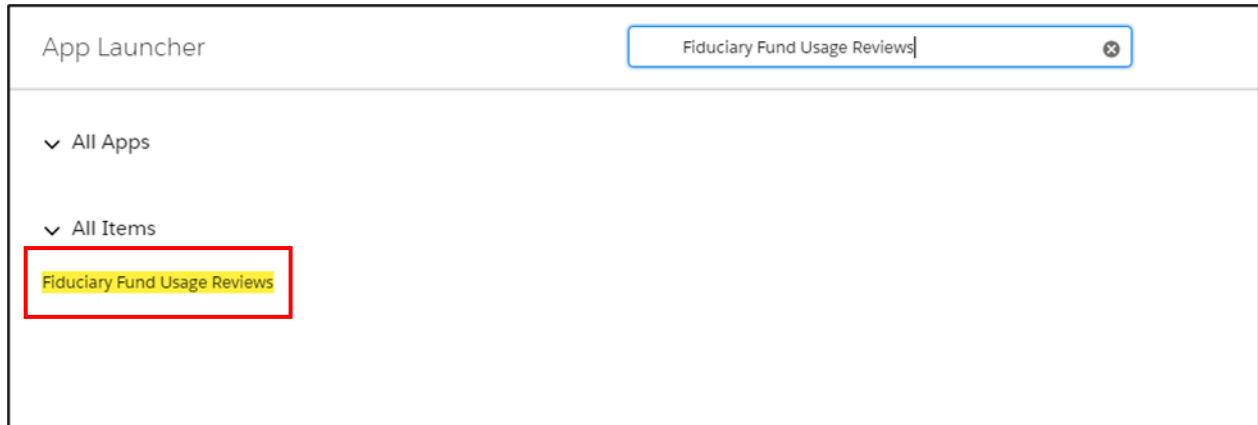


2. Then click the **View All** button.

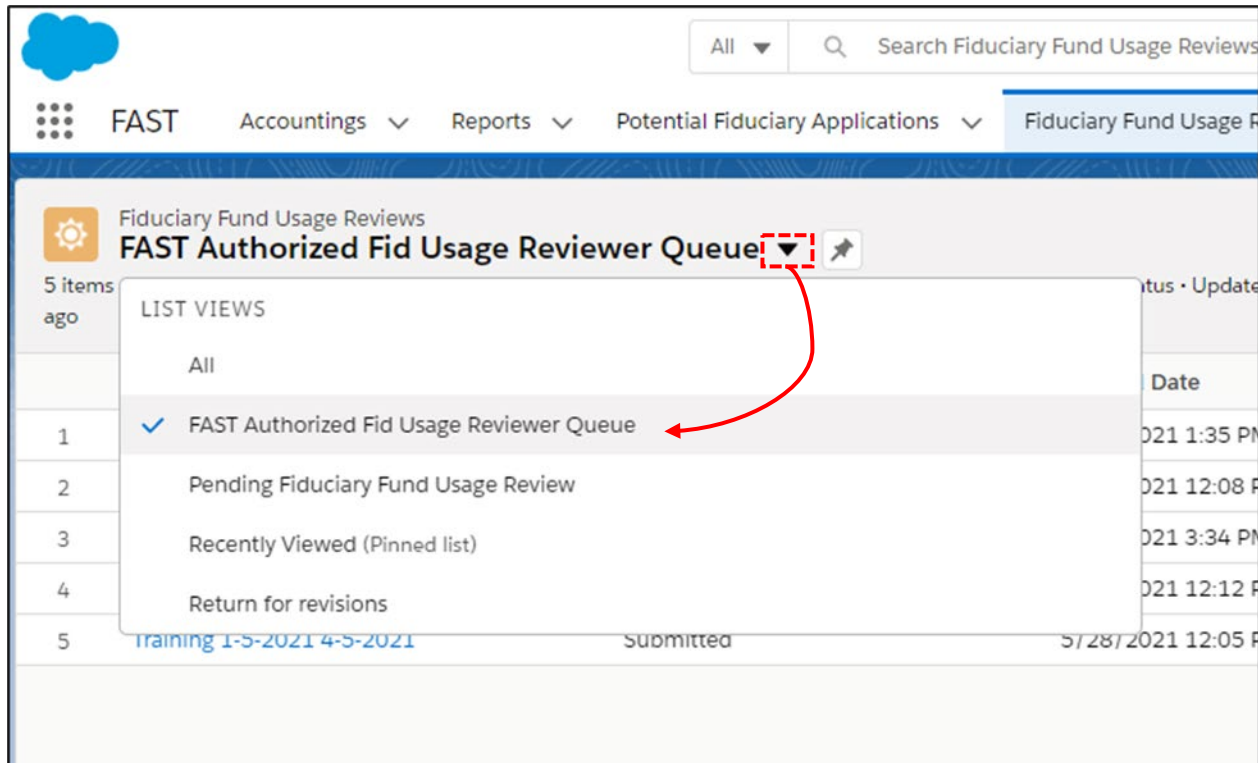


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- Next, in the search box type “Fiduciary Fund Usage Reviews” then click the option to open the tab.



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



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5. Click on 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 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 click **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?
--None--

Reason for Incomplete

Additional Bonds Purchased?

Revisions Requested

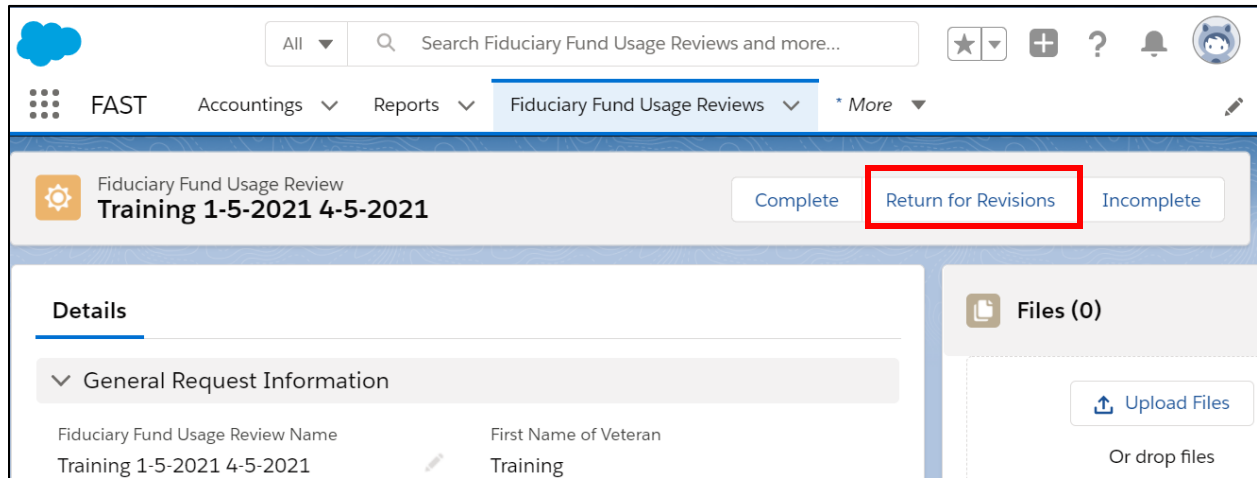
Savings Bonds Cashed?

Additional Remarks

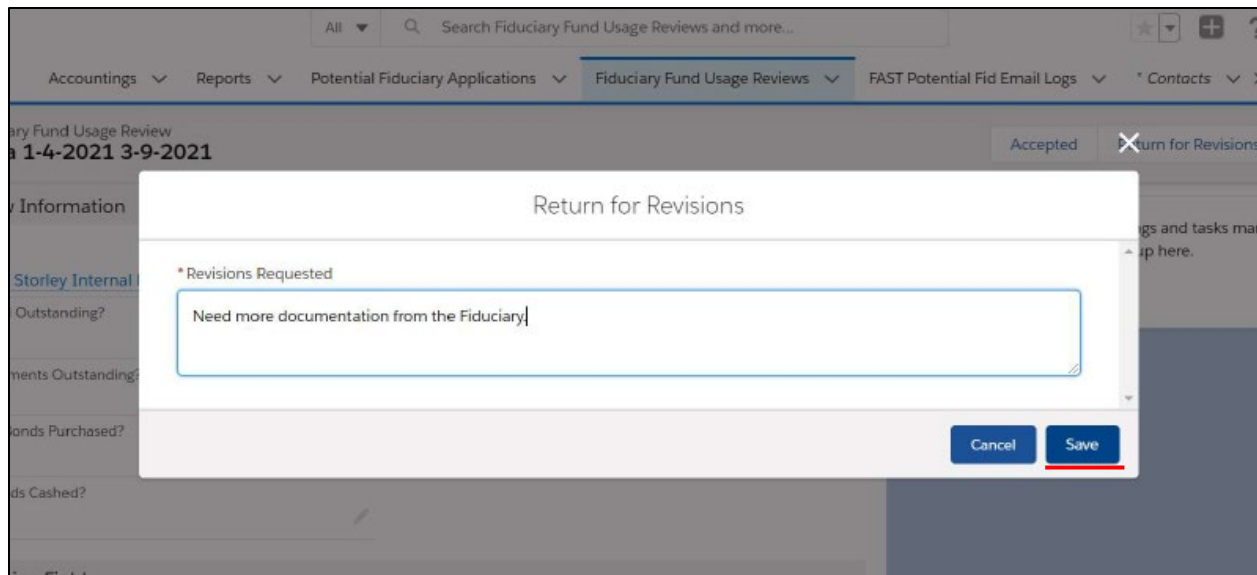


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7. As the Reviewer on the top right of the screen click the **Return for Revisions** button.



8. 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 click **Save**.



Fiduciary Accountings Submission Tool (FAST)

Training Job Aid

Return for Revisions on Fiduciary Fund Usage Review

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

The screenshot shows the FAST interface for a Fiduciary Fund Usage Review. The breadcrumb trail is: FAST > Accountings > Reports > Fiduciary Fund Usage Reviews. The review title is "Fiduciary Fund Usage Review Training 1-5-2021 4-5-2021" with a "Complete" button. The reviewer is "Tracy Barker LIE User 1". The status is "Revisions Requested". The form includes the following fields:

Field	Value
Reviewer	Tracy Barker LIE User 1
Status	Revisions Requested
Surety Bond Outstanding?	<input type="checkbox"/>
Disposition	
Court Documents Outstanding?	<input type="checkbox"/>
Reason for Incomplete	
Additional Bonds Purchased?	<input type="checkbox"/>
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.

