

Fiduciary Accountings Submission Tool (FAST) Training Job Aid Potential Fiduciary Application (View)



Objective

To provide the FE with steps on how to view a Potential Fiduciary Application.



Audience

User: FE

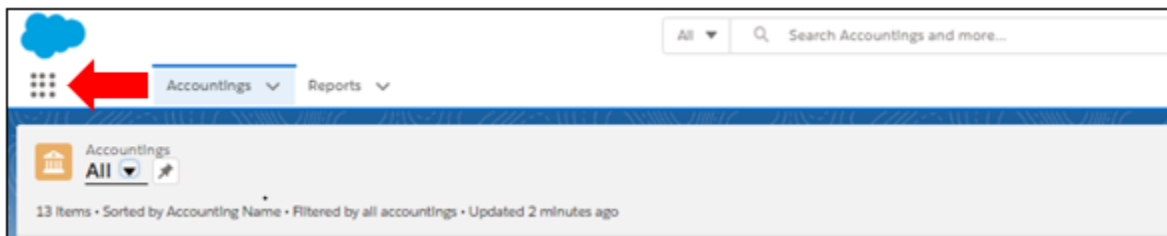
Prerequisite

The Potential Fiduciary Application has been submitted.

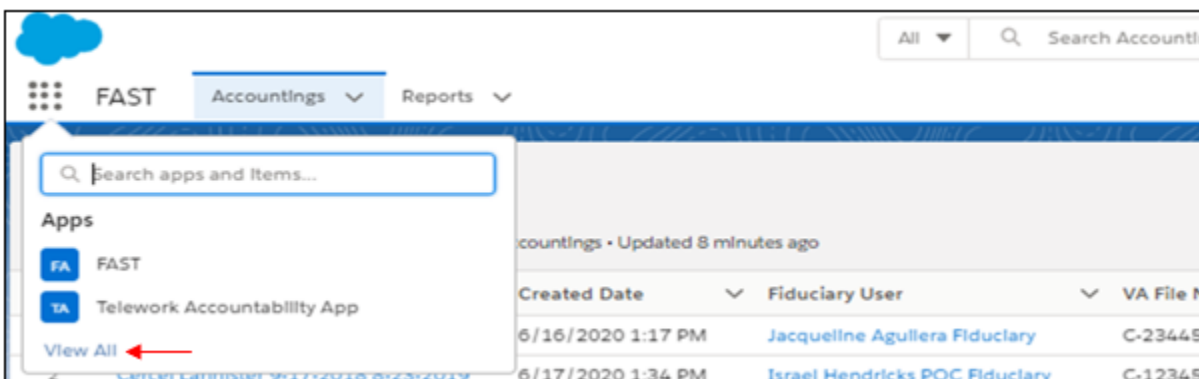
Instructions

Log into **Salesforce**

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

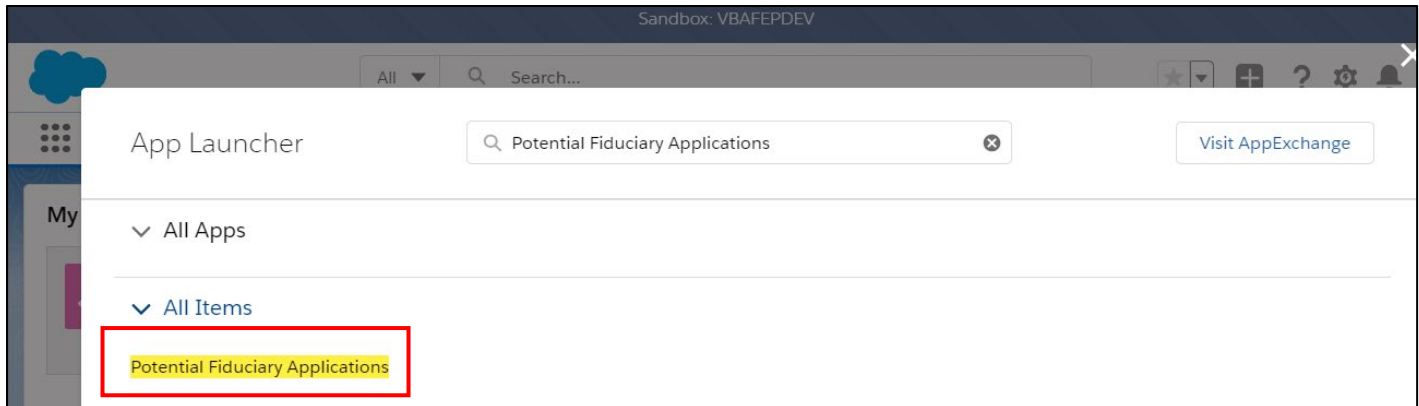


2. Then click the **View All** button.



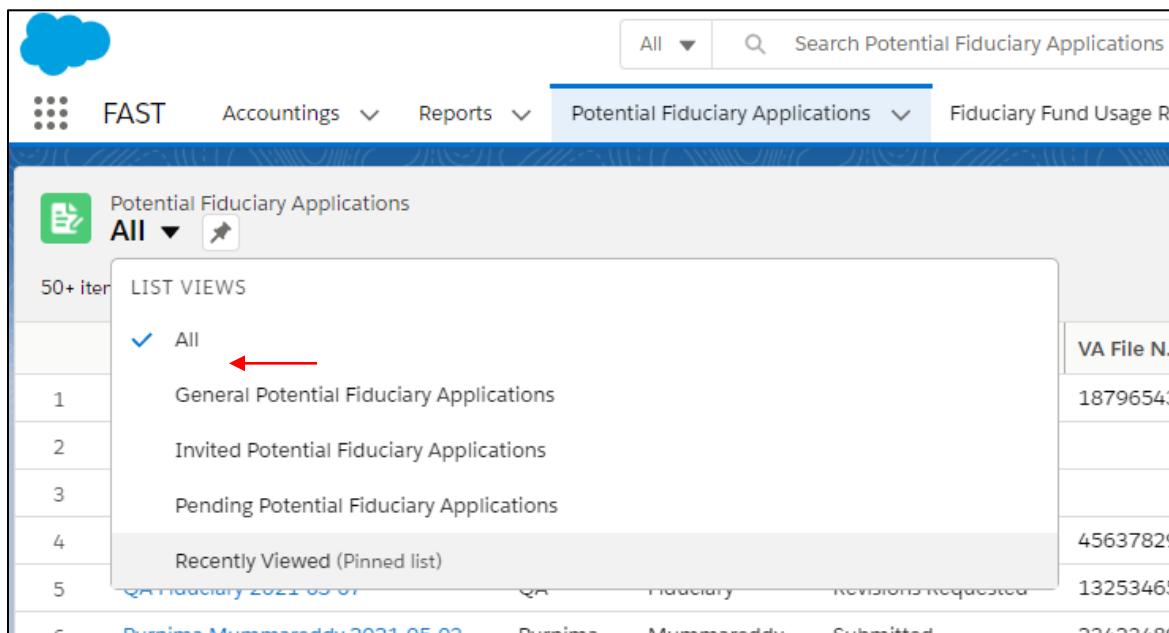
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- Next, in the search box type “Potential Fiduciary Applications” then click the option to open the tab.



- Within the **Potential Fiduciary Applications** tab, the following list views are available:

All, General Potential Fiduciary Application, Invited Potential Fiduciary Application, Pending Potential Fiduciary Application, Recently Viewed

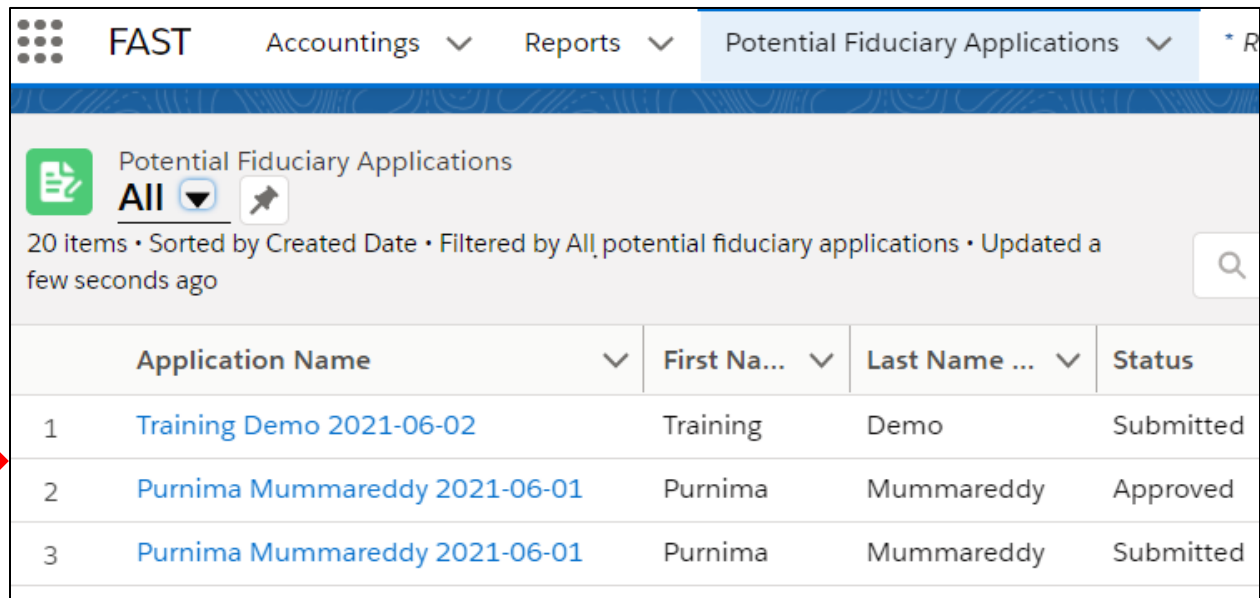


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5. Click the **name** of the **Potential Fiduciary Application** for review.



The screenshot shows the FAST application interface. At the top, there are navigation tabs for 'Accountings', 'Reports', and 'Potential Fiduciary Applications'. Below the tabs, there is a search bar and a filter dropdown set to 'All'. The main content area displays a table of potential fiduciary applications. A red arrow points to the first application in the list.

	Application Name	First Na...	Last Name ...	Status
1	Training Demo 2021-06-02	Training	Demo	Submitted
2	Purnima Mummareddy 2021-06-01	Purnima	Mummareddy	Approved
3	Purnima Mummareddy 2021-06-01	Purnima	Mummareddy	Submitted

6. Once in the **Application** record there are **four** sections to review:

- **General Information-** Applicant Name, Fiduciary Contact, Reviewer, SSN, Email Address of VA Inviter, Invited by a Pension & Fiduciary Service (checkbox), Firm Name, Application Status, Application Submission Date, and Professional/Individual.
- **Beneficiary Information-** First, Middle and Last name of Veteran, and First, Middle and Last name of Beneficiary.
- **Fiduciary Information-** First Name of Proposed Fiduciary, Last Name of Proposed Fiduciary, Date of Birth, VA File Number, Tax ID, Serve Multiple Beneficiaries, Source of Income, Approximate annual income, Signature and Sign Date.
- **Fiduciary Address Information-** Email, Telephone Number, Mailing Address, and Physical Address.

Within the **General Information** section by clicking the pencil icon you can assign yourself as a reviewer. As a reviewer you can edit the email address of the inviter to include marking the checkbox. Please note you are not authorized to edit the Application Name.

Please see images below



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General Information Viewpoint

Application Name Training Demo 2021-06-02	Firm Name
Fiduciary Contact Training Demo	Status Under Review
Reviewer	Submitted Date 6/2/2021 10:51 AM
Social Security Number 123123456	Professional/Individual Individual
Email address of VA inviter	
Invited by a Pension & Fiduciary Service 1 <input type="checkbox"/>	

Beneficiary Information Viewpoint

▼ Beneficiary Information

First Name of Veteran Training	First Name of Beneficiary Training
Middle Name of the Veteran Demo	Middle Name of the Beneficiary
Last Name of the Veteran Demo	Last Name of the Beneficiary Demo



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Fiduciary Information Viewpoint

▼ Fiduciary Information	
First Name of Proposed Fiduciary Training	Serve Multiple Beneficiaries? <input type="checkbox"/>
Last Name of Proposed Fiduciary Demo	Source of Income
Date of Birth 6/1/2000	Approximate annual income
VA File Number	Signature mm
Tax ID	Sign Date 6/2/2021

Fiduciary Address Information Viewpoint

▼ Fiduciary Address Information	
Email gan.mon@va.go	Preferred Method of Contact Phone
Telephone Number (123) 456-7899	Physical Street 123 Example St
Mailing Street 123 Example St	Physical City Lanham
Mailing City Lanham	Physical Zip Code 29999
Mailing Zip Code 29999	Physical State Nebraska
Mailing State Nebraska	

Outcome

The FE has viewed the application and is ready to take action to approve, reject or return for revision on the Potential Fiduciary Application.

