

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



Objective

To provide the FE with steps on how to approve a Potential Fiduciary Application after an application has been submitted.



Audience

User: FE

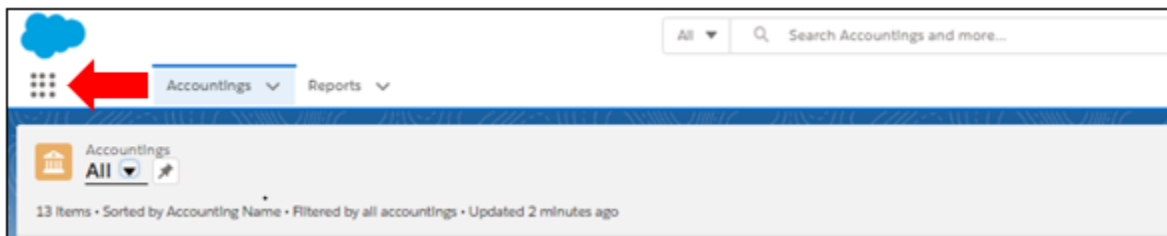
Prerequisite

The Potential Fiduciary has submitted their application.

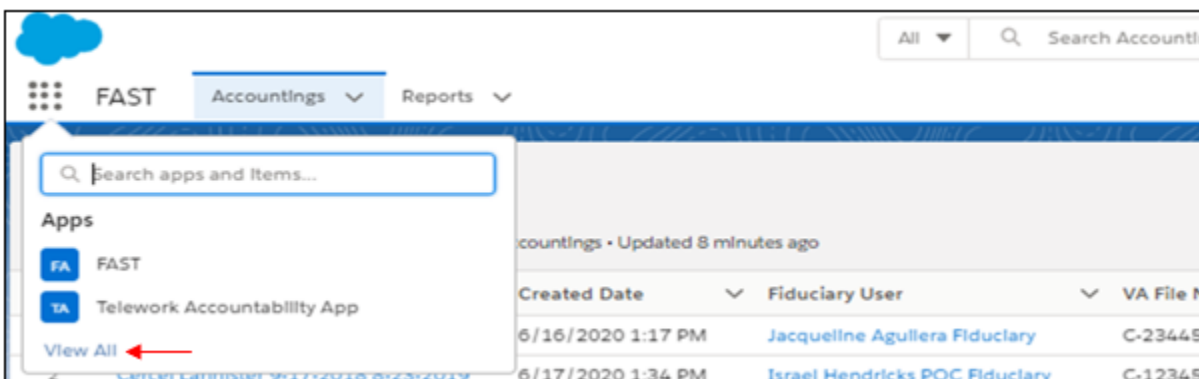
Instructions

Log into **Salesforce**

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

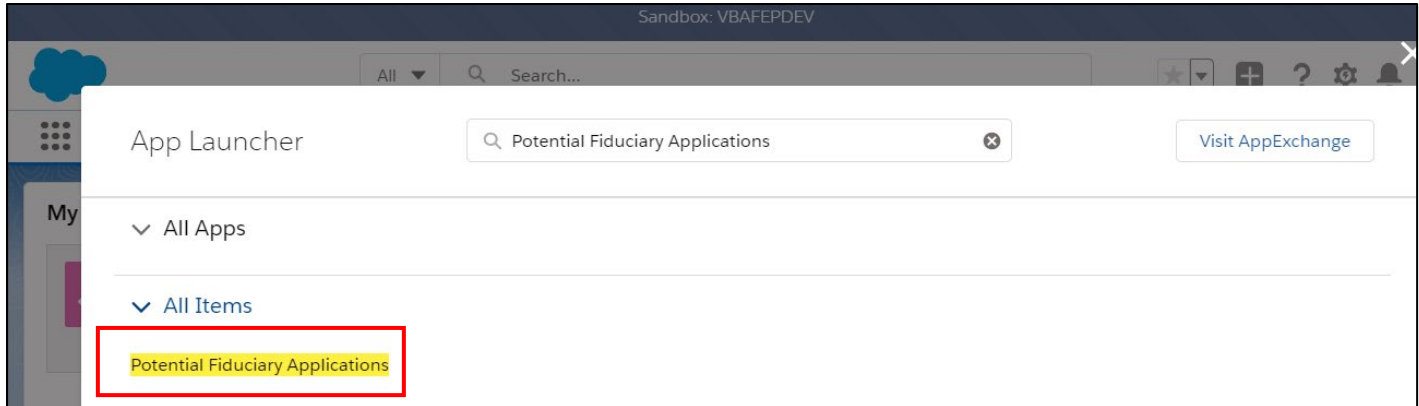


2. Then click the **View All** button.

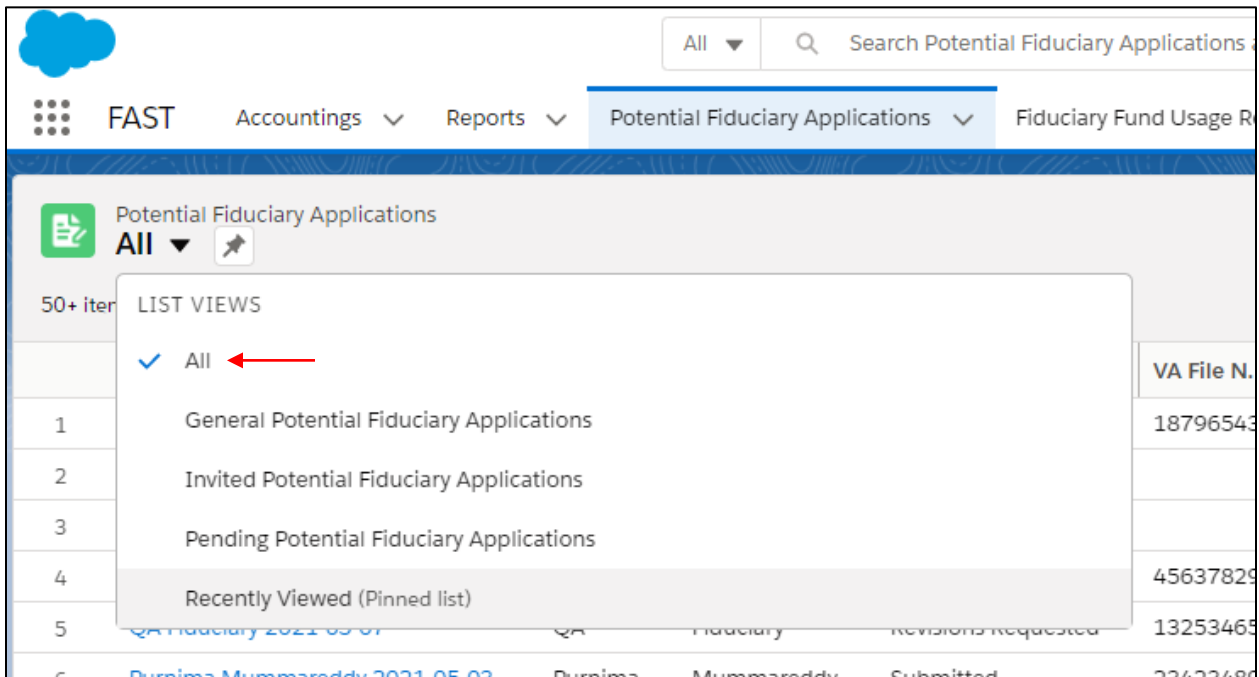


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3. Next, in the search box type “Potential Fiduciary Applications” then click the option to open the tab.

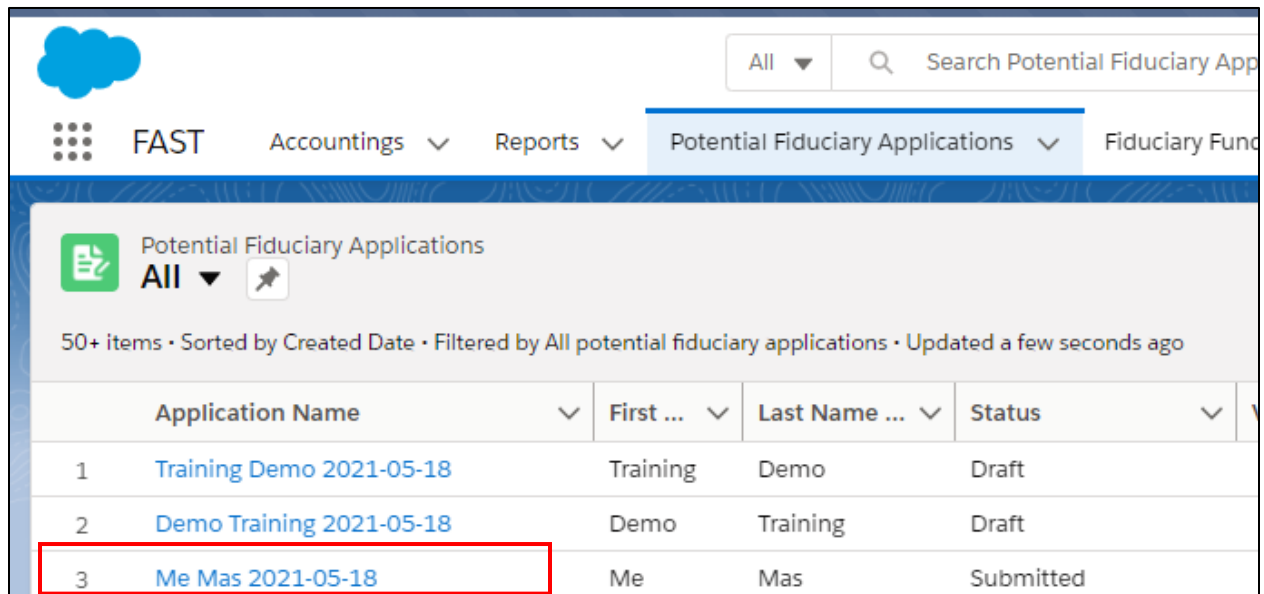


4. Once in the **Potential Fiduciary Applications** tab, click list view and select **'All'** list view.



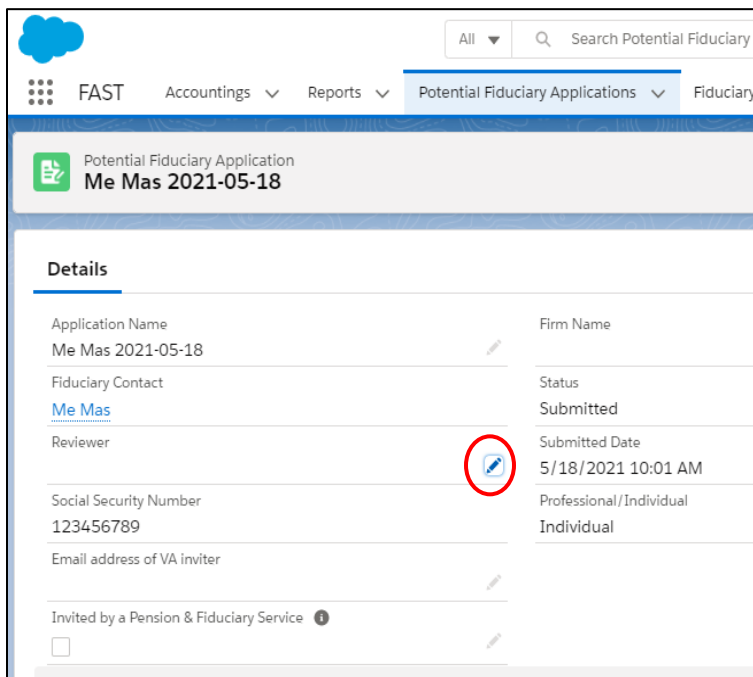
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5. Then click the **name** of the submitted **Potential Fiduciary Application**.




	Application Name	First ...	Last Name ...	Status
1	Training Demo 2021-05-18	Training	Demo	Draft
2	Demo Training 2021-05-18	Demo	Training	Draft
3	Me Mas 2021-05-18	Me	Mas	Submitted

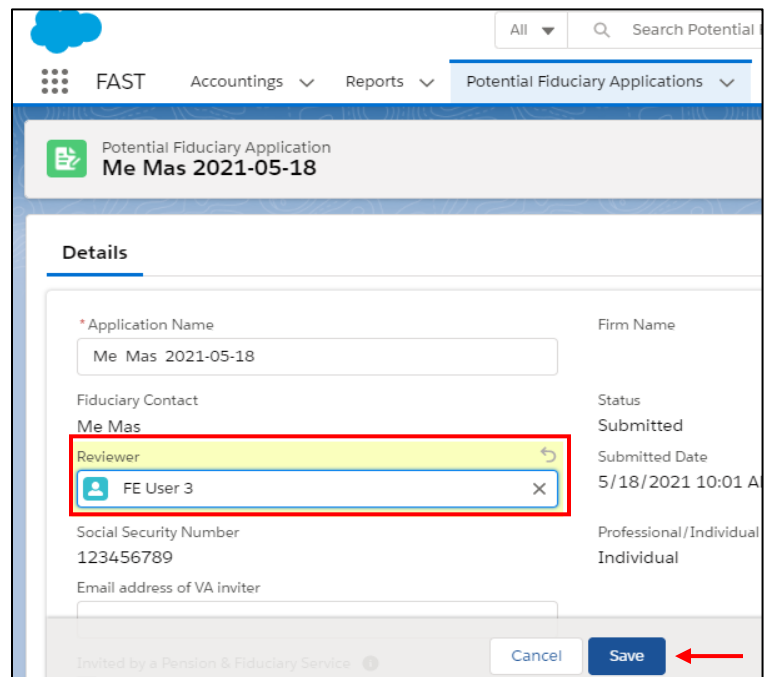
6. Once in the **Application** record go to the **'Reviewer'** field, click the edit button (pencil icon), and add yourself as the reviewer, click save.



Potential Fiduciary Application
Me Mas 2021-05-18


Details

Application Name	Me Mas 2021-05-18	Firm Name	
Fiduciary Contact	Me Mas	Status	Submitted
Reviewer		Submitted Date	5/18/2021 10:01 AM
Social Security Number	123456789	Professional/Individual	Individual
Email address of VA inviter			
Invited by a Pension & Fiduciary Service	<input type="checkbox"/>		



Potential Fiduciary Application
Me Mas 2021-05-18

Details

*Application Name	Me Mas 2021-05-18	Firm Name	
Fiduciary Contact	Me Mas	Status	Submitted
Reviewer	 FE User 3	Submitted Date	5/18/2021 10:01 AM
Social Security Number	123456789	Professional/Individual	Individual
Email address of VA inviter			
Invited by a Pension & Fiduciary Service	<input type="checkbox"/>		

Cancel Save



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- Once you have reviewed the **application** and determined it can be approved, select the **Approve** button located on the top right of the screen.

Potential Fiduciary Application
Me Mas 2021-05-18

Approve Return for Revisions Rejected

Details

Application Name Me Mas 2021-05-18	Firm Name
Fiduciary Contact Me Mas	Status Under Review
Reviewer FE User 3	Submitted Date 5/18/2021 10:01 AM
Social Security Number 123456789	Professional/Individual Individual
Email address of VA inviter	

Files (0)

Upload Files

Or drop files

- Input your signature in the **“Signature field”** and click next.

Potential Fiduciary Application
Me Mas 2021-05-18

Approve

* Signature of Field Examiner

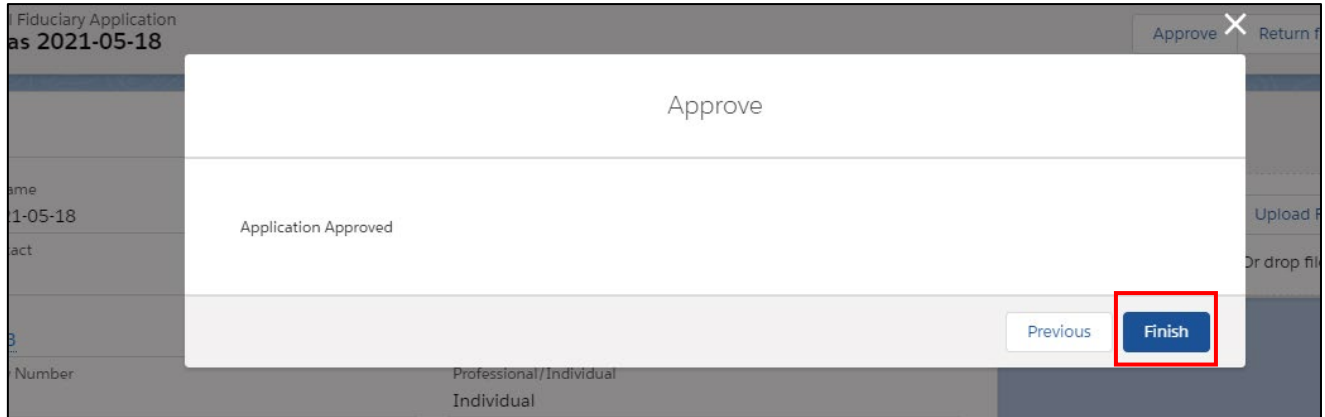
Sign Date
May 18, 2021

Next

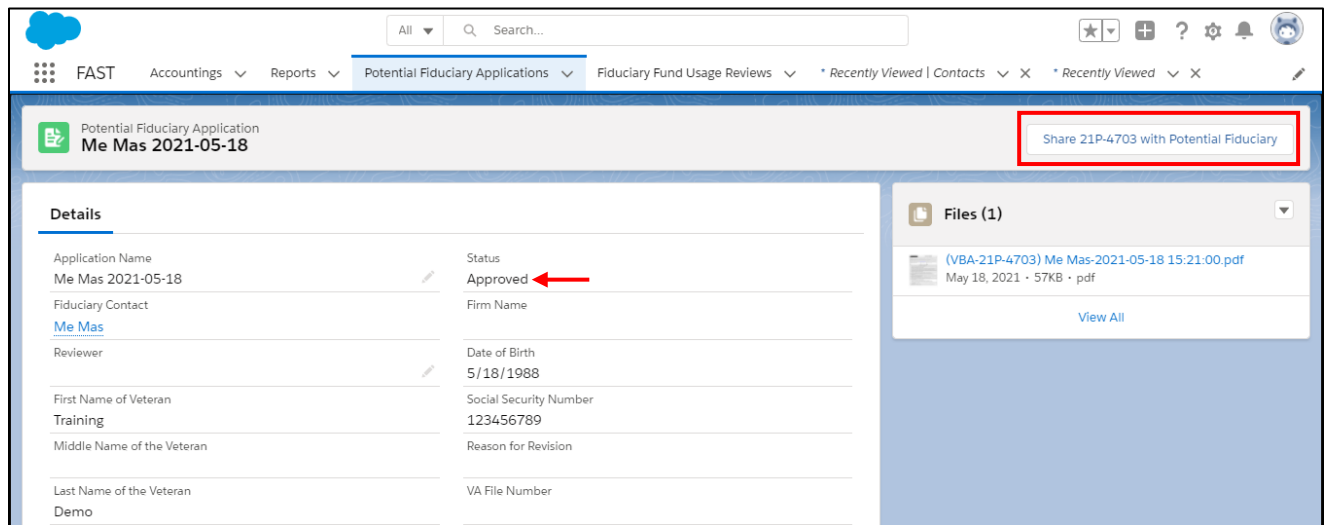


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9. An “Approval Confirmation” will appear, then click the **finish** button.



10. Once the “Potential Fiduciary Application” has been approved, the status field will change to **Approved**. Wait a moment, refresh the page so the **21P- 4703** form populates in the files section. Then click the **Share 21P-4703 with Potential Fiduciary** button.



Outcome

The FE has approved and shared the 21P-4703 with the applicant.

