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.
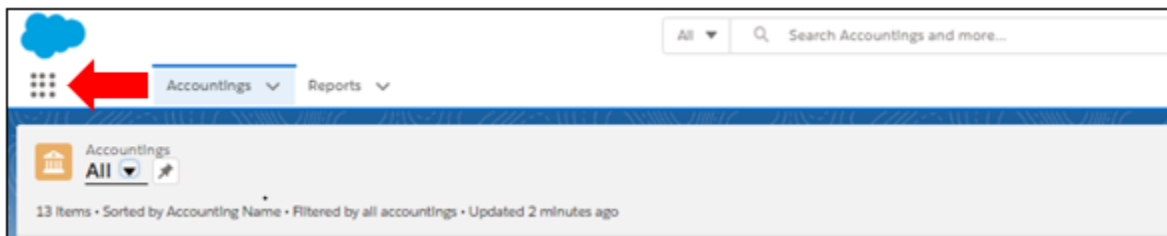
Audience

User: FE

Prerequisite

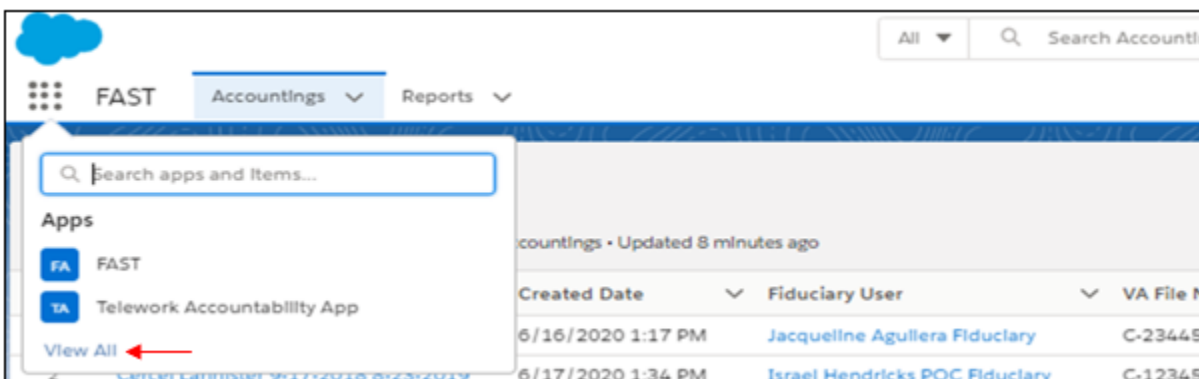The Potential Fiduciary has submitted their application.

Instructions

Log into **Salesforce**

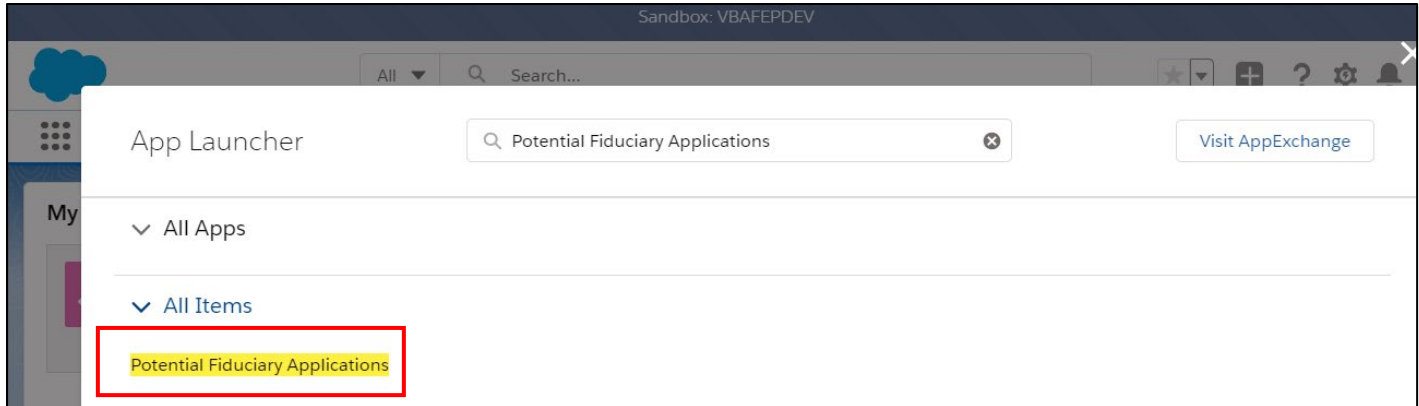1. Click the **Apps** icon at the top left of the homepage screen.
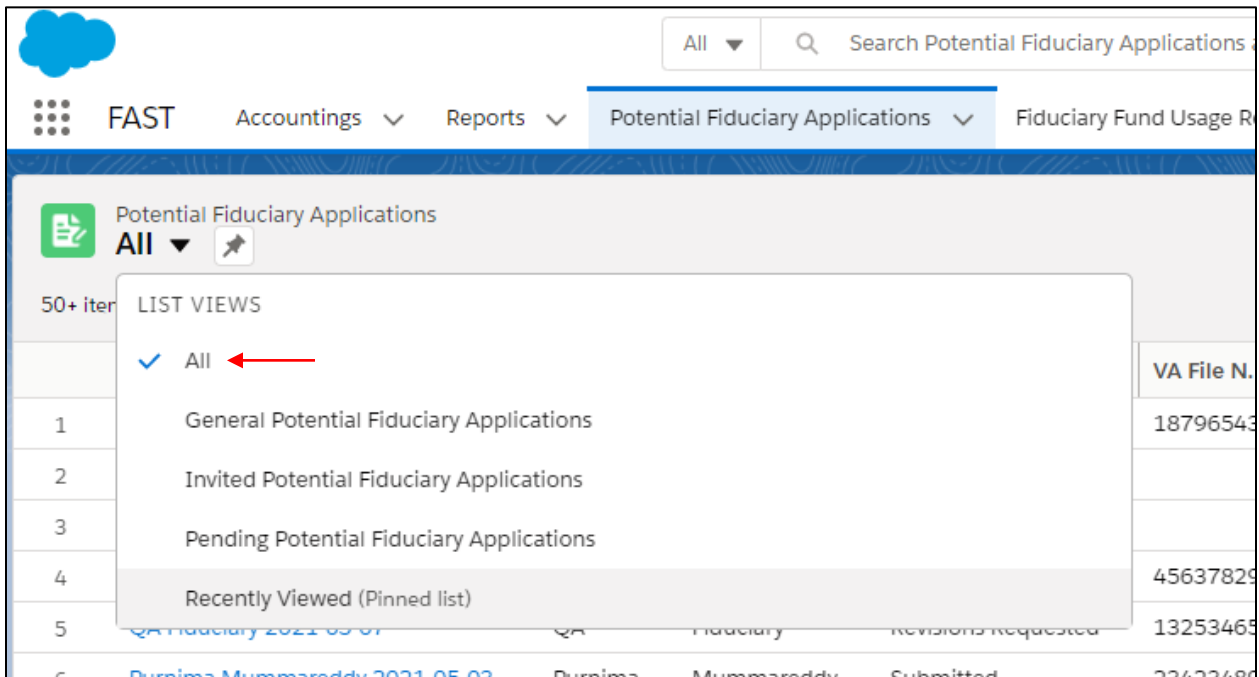

2. Then click the **View All** button.

3. Next, <u>in the search box type</u> **"Potential Fiduciary Applications"** then <u>click</u> the option to open the tab.
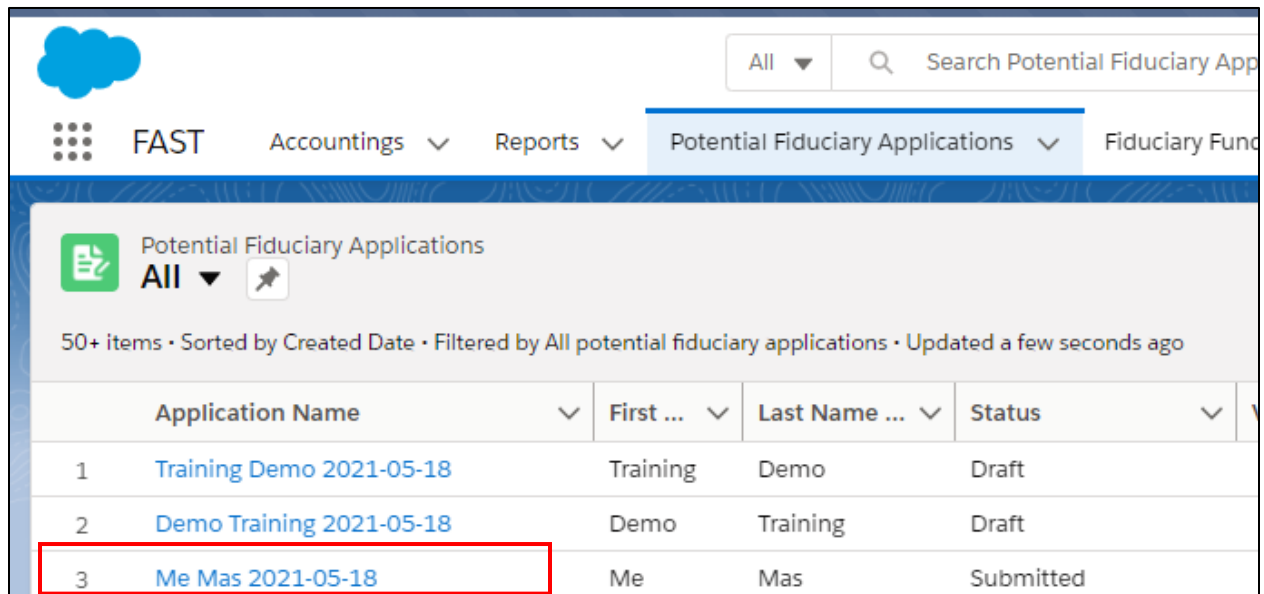
4. Once in the **Potential Fiduciary Applications** tab, <u>click</u> list view and select **'All'** list view.
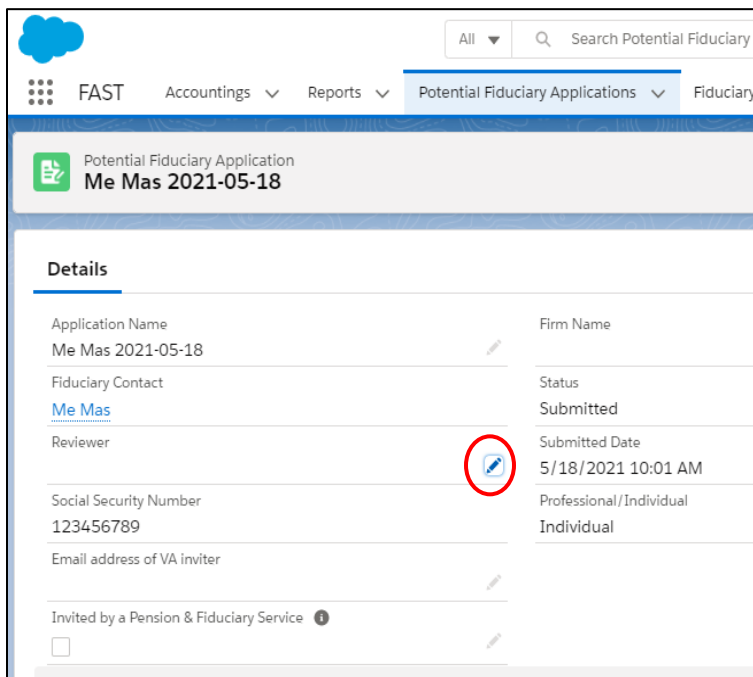
5. Then <u>click</u> the **name** of the submitted **Potential Fiduciary Application.**

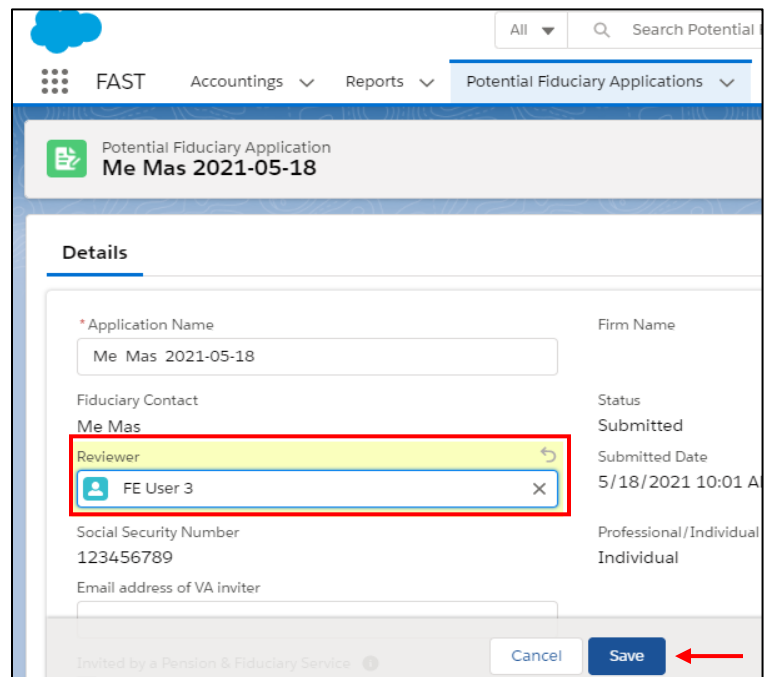6. Once in the **Application** record go to the **'Reviewer'** field, click the edit button (pencil icon), and add yourself as the reviewer, <u>click</u> **save.**

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

8. Input your signature in the **"Signature field"** and click <u>next.</u>

9. An **"Approval Confirmation"** will appear, then <u>click</u> the **finish** button.
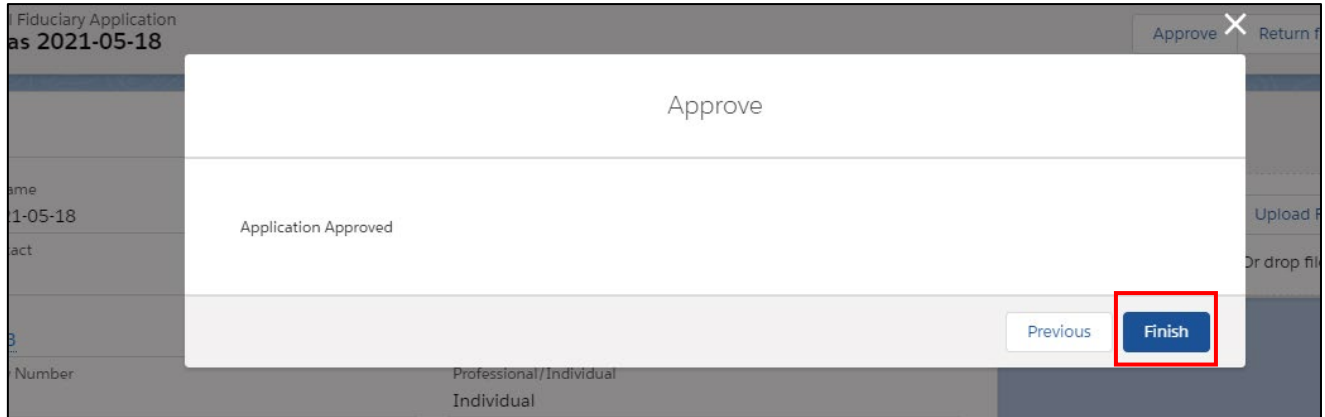
10. Once the **"Potential Fiduciary Application"** has been approved, the status field will change to **Approved**. Wait a moment, refresh the page so the **21P- 4703** form populates in the files section. Then <u>click</u> the **Share 21P-4703 with Potential Fiduciary** button.
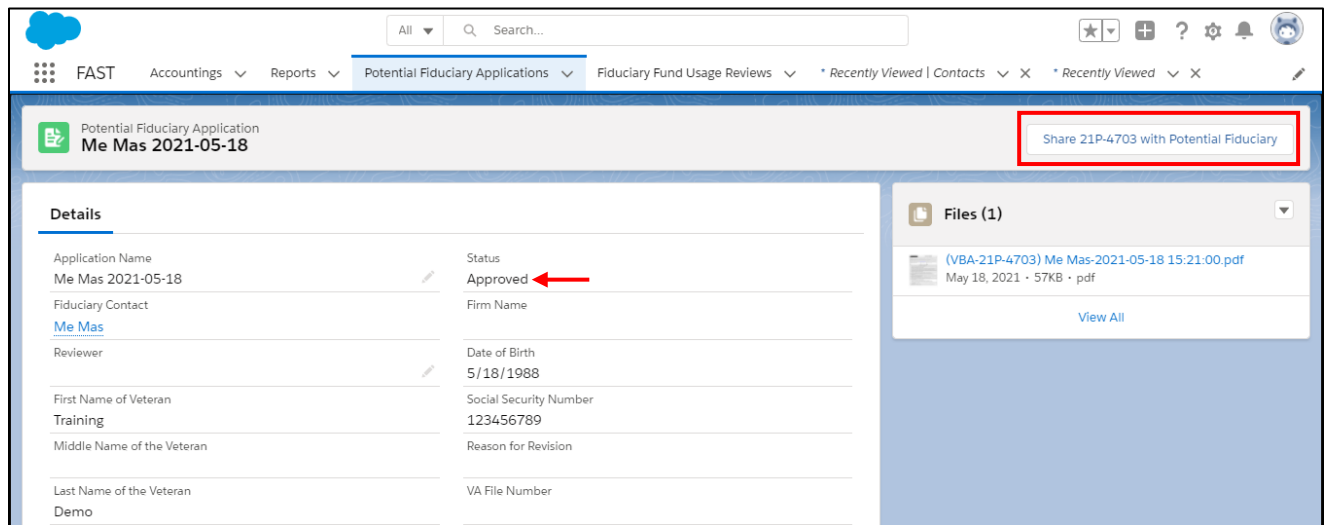
Outcome
The FE has approved and shared the 21P-4703 with the applicant.