

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



Objective

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



Audience

User: FE

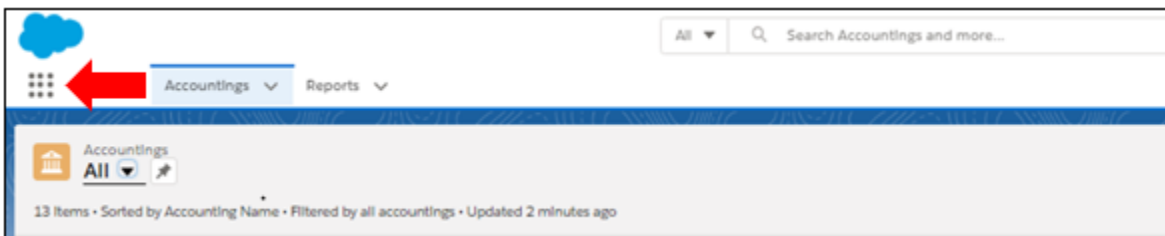
Prerequisite

The potential Fiduciary has submitted their application.

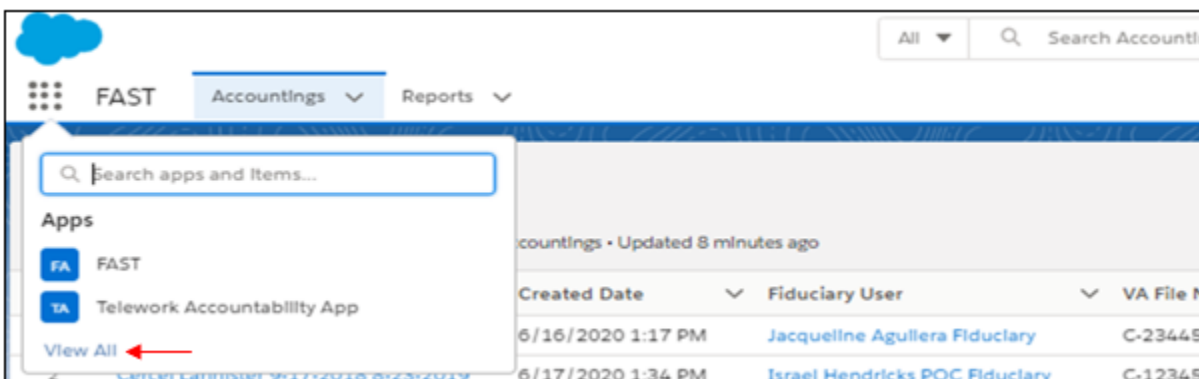
Instructions

Log into **Salesforce**

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

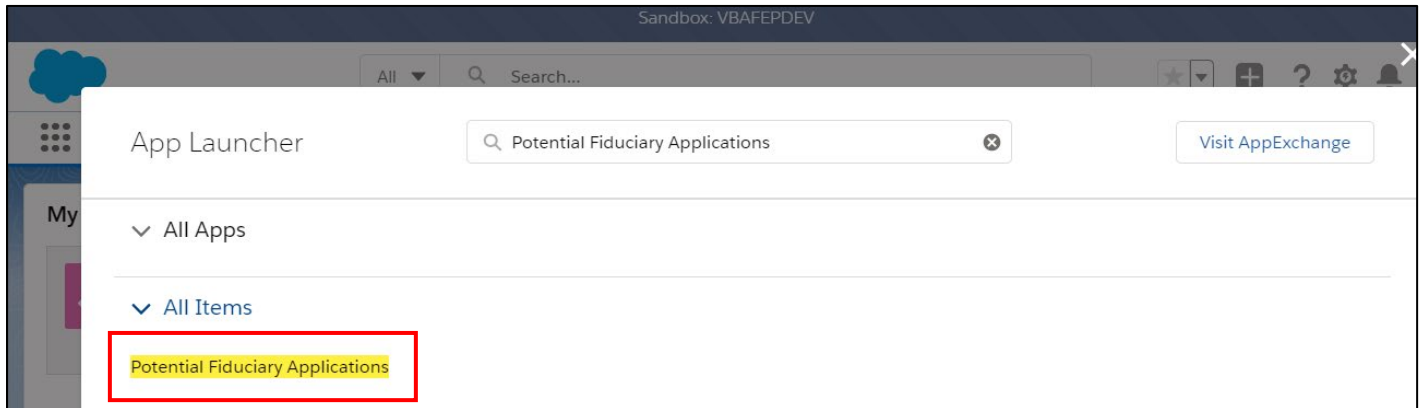


2. Then click the **View All** button.

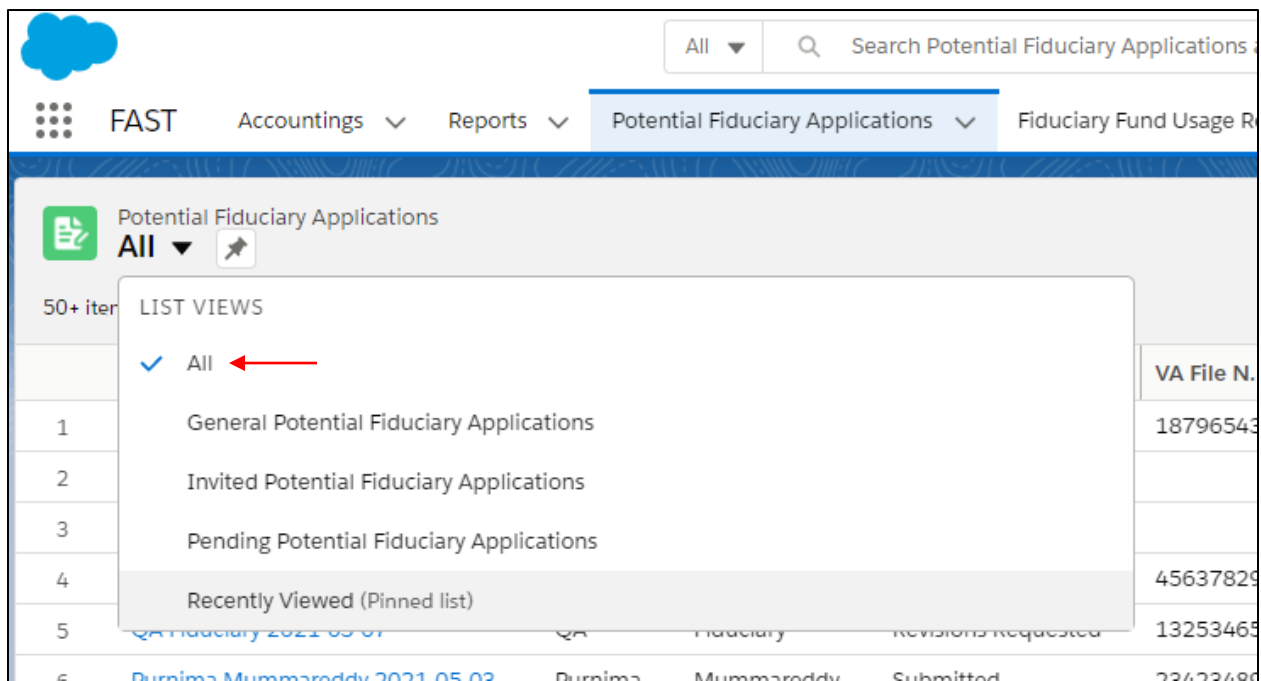


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- Next, in the search box type “Potential Fiduciary Applications” then click the option to open the tab.

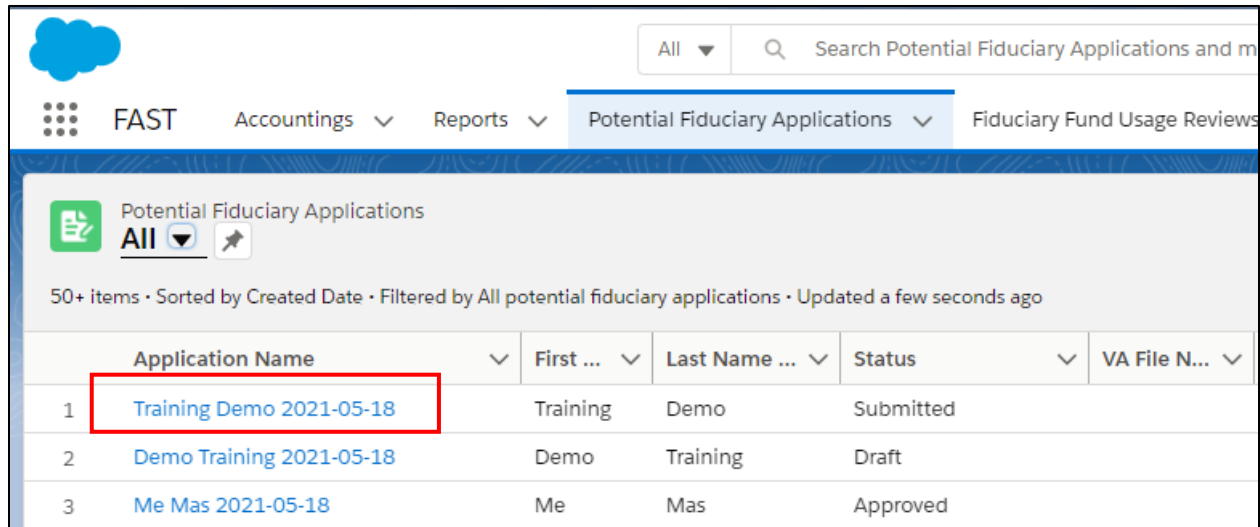


- Once in the **Potential Fiduciary Applications** tab, click list view and select **'All'**.



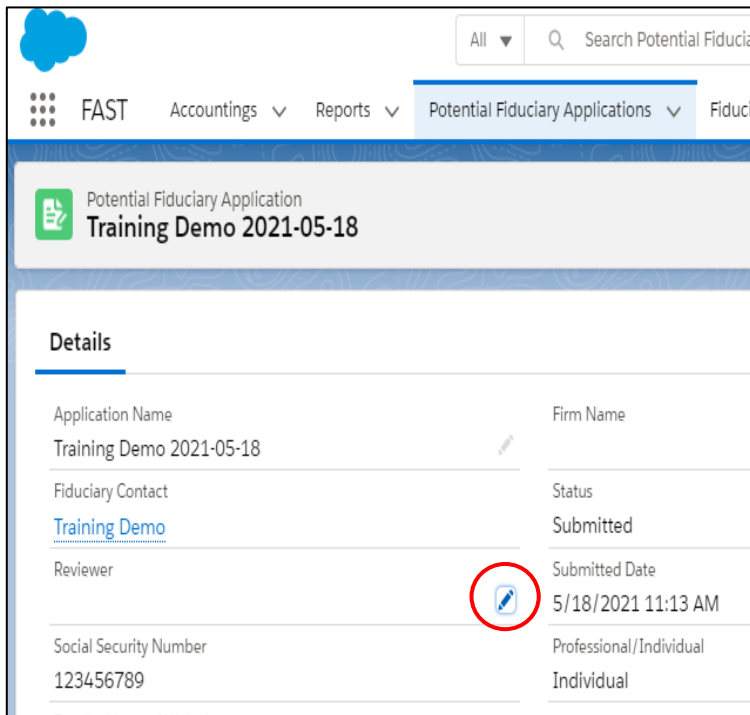
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5. Then click the **name** of the submitted **Potential Fiduciary Application**.



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

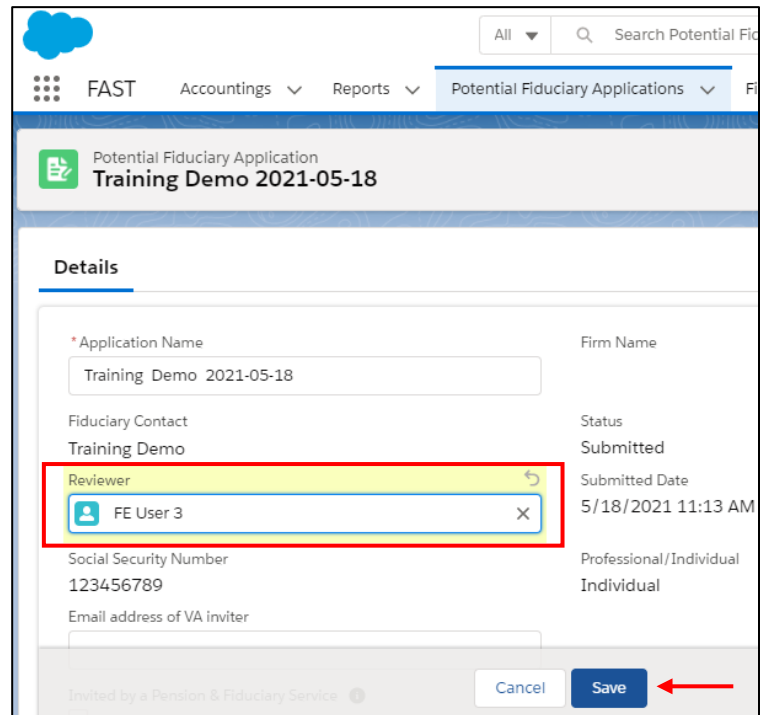
6. Once in the **Application** record go to the **'Reviewer'** field, click the edit button (pencil icon), and add yourself as the reviewer, then click **save**.



Potential Fiduciary Application
Training Demo 2021-05-18

Details

Application Name	Training Demo 2021-05-18	Firm Name	
Fiduciary Contact	Training Demo	Status	Submitted
Reviewer		Submitted Date	5/18/2021 11:13 AM
Social Security Number	123456789	Professional/Individual	Individual



Potential Fiduciary Application
Training Demo 2021-05-18

Details

*Application Name	Training Demo 2021-05-18	Firm Name	
Fiduciary Contact	Training Demo	Status	Submitted
Reviewer	FE User 3	Submitted Date	5/18/2021 11:13 AM
Social Security Number	123456789	Professional/Individual	Individual
Email address of VA inviter			

Invited by a Pension & Fiduciary Service

Cancel Save



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

The screenshot shows the FAST application review interface. At the top, there is a search bar and navigation tabs. The main content area displays the application details for 'Training Demo 2021-05-18'. The 'Rejected' button is highlighted with a red box.

Details	
Application Name Training Demo 2021-05-18	Firm Name
Fiduciary Contact Training Demo	Status Under Review
Reviewer FE User 3	Submitted Date 5/18/2021 11:13 AM
Social Security Number 123456789	Professional/Individual Individual

Files (0)
Upload Files
Or drop files

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

The screenshot shows a dialog box titled 'Rejected'. It contains a text input field labeled '* Name of Reviewer'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red circle.

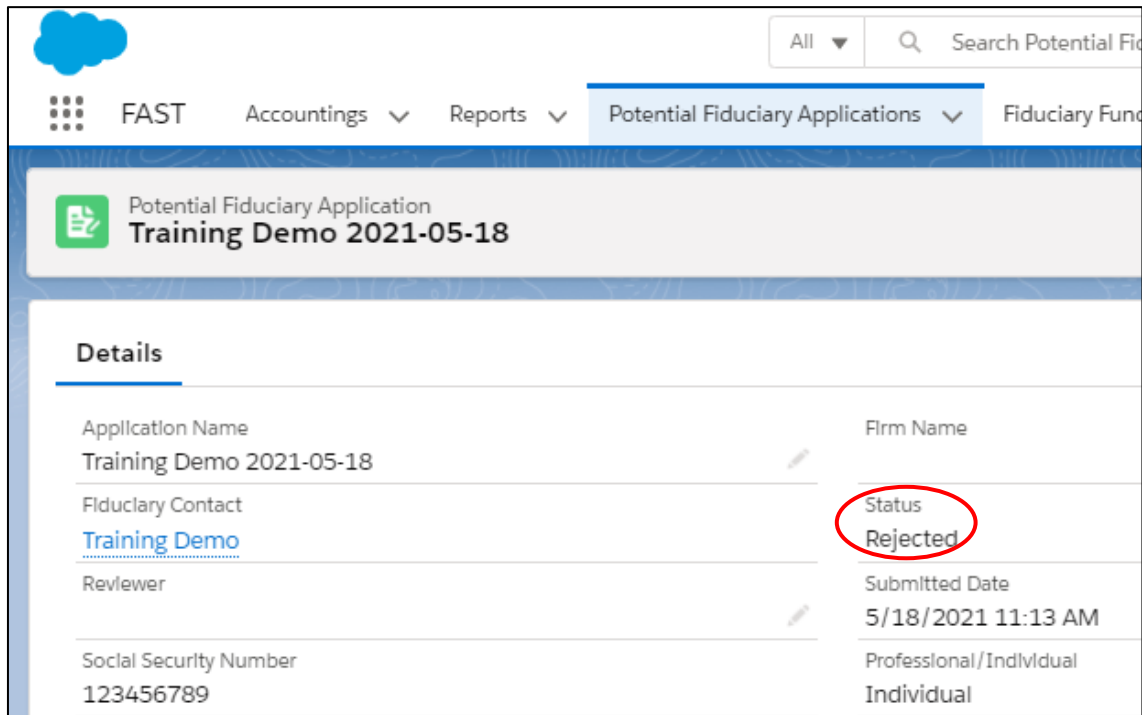


Fiduciary Accountings Submission Tool (FAST)

Training Job Aid

Potential Fiduciary Application (Reject)

9. Once the “Potential Fiduciary Application” has been rejected, the status field will change to **Rejected**.



The screenshot displays the FAST web application interface. At the top, there is a navigation bar with a search box and a dropdown menu set to 'All'. Below the navigation bar, the breadcrumb trail reads: FAST > Accountings > Reports > Potential Fiduciary Applications > Fiduciary Fund. The main content area shows a 'Potential Fiduciary Application' for 'Training Demo 2021-05-18'. Under the 'Details' section, a table lists application information:

Application Name	Training Demo 2021-05-18	Firm Name	
Fiduciary Contact	Training Demo	Status	Rejected
Reviewer		Submitted Date	5/18/2021 11:13 AM
Social Security Number	123456789	Professional/Individual	Individual

Outcome

The FE has rejected the Potential Fiduciary Application. The Potential Fiduciary will be notified of their rejection via email.

