

#### **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. <u>Click</u> the **Apps** icon at the top left of the homepage screen.

	All 🔻 🔍 Search Accountings and more						
Accountings V Reports V							
13 Items • Sorted by Accounting Name • Filtered by all accountings • Updated 2 minutes ago							

#### 2. Then <u>click</u> the View All button.

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		, <mark>β</mark> earch app	s and Items	XXX - 1100		]		- <u></u> . 11	GUUNNIII IIIIUUUUUU	<u>\</u> /	(( ///
	App	FAST					countings • Updated 8	minu	ites ago		
	ТА	Telework A	ccountability Ap	pp			Created Date	$\sim$	Fiduciary User	$\sim$	VA File N
	Vie	N All					6/16/2020 1:17 PM		Jacqueline Aguilera Fiduciary		C-23445
٦	- 4	Cercer L	mmsor 9-17-20	/10 0.23	2019		6/17/2020 1:34 PM		Israel Hendricks POC Fiduciary		C-12345

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3. Next, <u>in the search box type</u> "Potential Fiduciary Applications" then <u>click</u> the option to open the tab.

		Sandbox: VBAFEPDEV		
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	App Launcher	Q Potential Fiduciary Applications	$\otimes$	Visit AppExchange
My	✓ All Apps			
Ľ	✓ All Items Potential Fiduciary Applications			

#### 4. Once in the Potential Fiduciary Applications tab, <u>click</u> list view and select 'All'.

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* * * * * * * * *	FAST Accountings 🗸 Reports 🗸	Potential Fiduo	iary Applications	✓ Fiduciary	und Usage R					
Đ	Potential Fiduciary Applications									
50+ ite	LIST VIEWS									
	V All				VA File N.					
1	General Potential Fiduciary Applications 187965									
2	Invited Potential Fiduciary Applications									
3	Pending Potential Fiduciary Applications									
4	Recently Viewed (Pinned list)				45637829					
5	-QA HOUCKARY 2021 05 01 Q		ary item.	sions requested	13253465					
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5. Then click the name of the submitted Potential Fiduciary Application.

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***	FAST Accountings 🗸	Reports	✓ Potent	ial Fiduciary Applica	ations 🗸	Fiduciary Fur	nd Usage Reviews
Potential Fiduciary Applications All 💌 💉 50+ items • Sorted by Created Date • Filtered by All potential fiduciary applications • Updated a few seconds ago							
	Application Name	~	First 🗸	Last Name 🗸	Status	$\sim$	VA File N $\checkmark$
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 <u>click</u> **save**.

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Potential Fiduciary Application Training Demo 2021-05-18		Potential Fiduciary Application Training Demo 2021-05-18 Details	
Details Application Name	Firm Name	* Application Name Training Demo 2021-05-18 Fiduciary Contact	Firm Name Status
Training Demo 2021-05-18	Status Submitted	Training Demo Reviewer FE User 3 X	Submitted Submitted Date 5/18/2021 11:13 AM
Reviewer	Submitted Date 5/18/2021 11:13 AM	Social Security Number 123456789 Email address of VA inviter	Professional/Individual Individual
Social Security Number 123456789	Professional/Individual Individual	Invited by a Pension & Fiduciary Service  Cancel	Save

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

<b>*</b>	All 🔻	All 👻 🔍 Search Potential Fiduciary Applications and more				* -	?‡	6
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Details			(725772//2772//2772/	🚺 File	s (0)			
Application Name Training Demo 2021-05-18	ľ	Firm Name				1 Upload Files		
Fiduciary Contact Training Demo		Status Under Review				Or drop files		
Reviewer		Submitted Date 5/18/2021 11:13	АМ					
Social Security Number 123456789		Professional/Individua Individual	al					

8. Input your signature in the "Signature field" and click save.

Rejected	
 Name of Reviewer	•
	Cancel Save



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

<b>*</b>	All 💌 🔍 Search Potential Fig
FAST Accountings 🗸 Reports 🗸	Potential Fiduciary Applications 🧹 Fiduciary Fund
Potential Fiduciary Application Training Demo 2021-05-18	
Details	
Application Name Training Demo 2021-05-18	Firm Name
Flduclary Contact Training Demo	Status Rejected
Revlewer	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.

