

### **Objective**

To provide the FE with steps on how to return a Potential Fiduciary Application to a Fiduciary for required corrections.



## Audience

User: FE

### Prerequisite

The FE has reviewed the Potential Fiduciary Application and noted there are required corrections needed.

### Instructions

#### Log into Salesforce

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

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

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

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

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5. Then <u>click</u> the name of the recently submitted Fiduciary Application.

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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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11111111	Social Security Number	Profession
Email address of VA inviter	11111111	Court
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Invited by a Pension & Fiduciary Service 🚺		

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7. Fill in the 'Name of Reviewer', then type the reason for the revision(s) in comment box. Then <u>click</u> save.

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8. The status field will change to Revisions Requested.

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### Outcome

The FE has sent revisions to the Fiduciary for implementation. The Fiduciary will be notified via email when the reviewer has requested revisions. Once revisions are completed by the Fiduciary, the FE can continue with the application disposition process.

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