

# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Request Revisions on Potential Fiduciary Application



## Objective

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



## Audience

User: FE

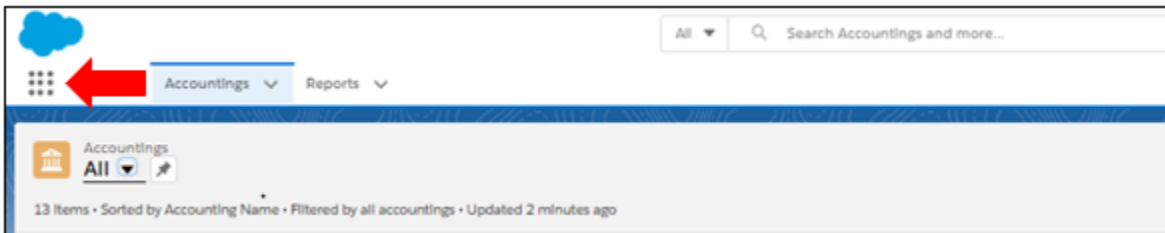
## Prerequisite

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

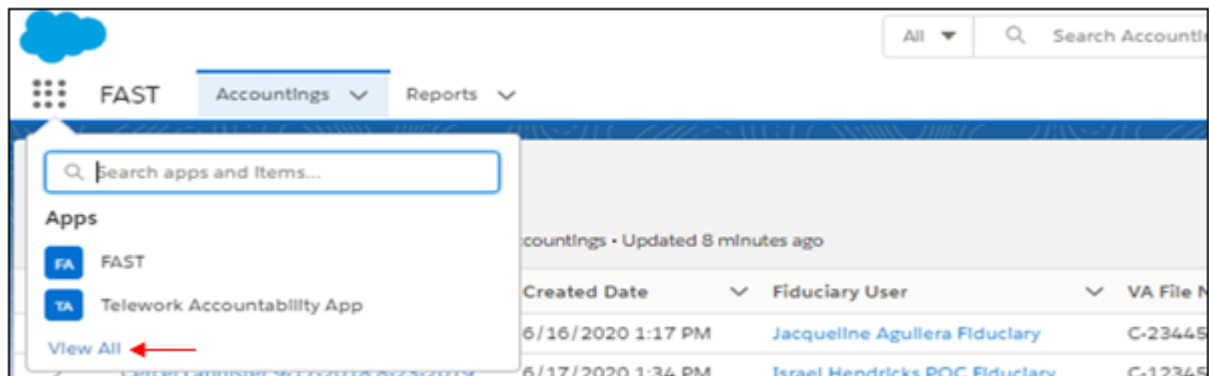
## Instructions

Log into **Salesforce**

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

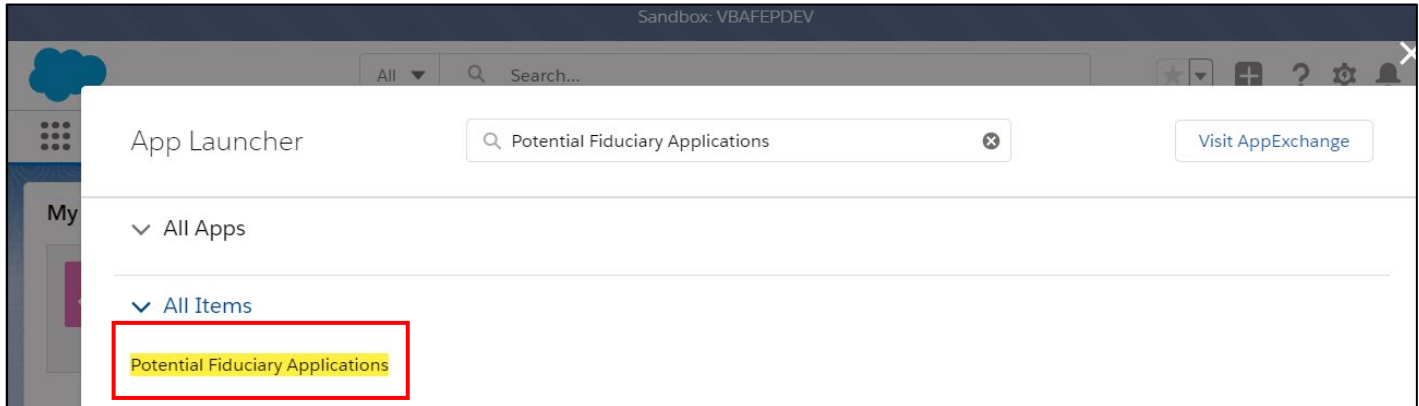


2. Then click the **View All** button.

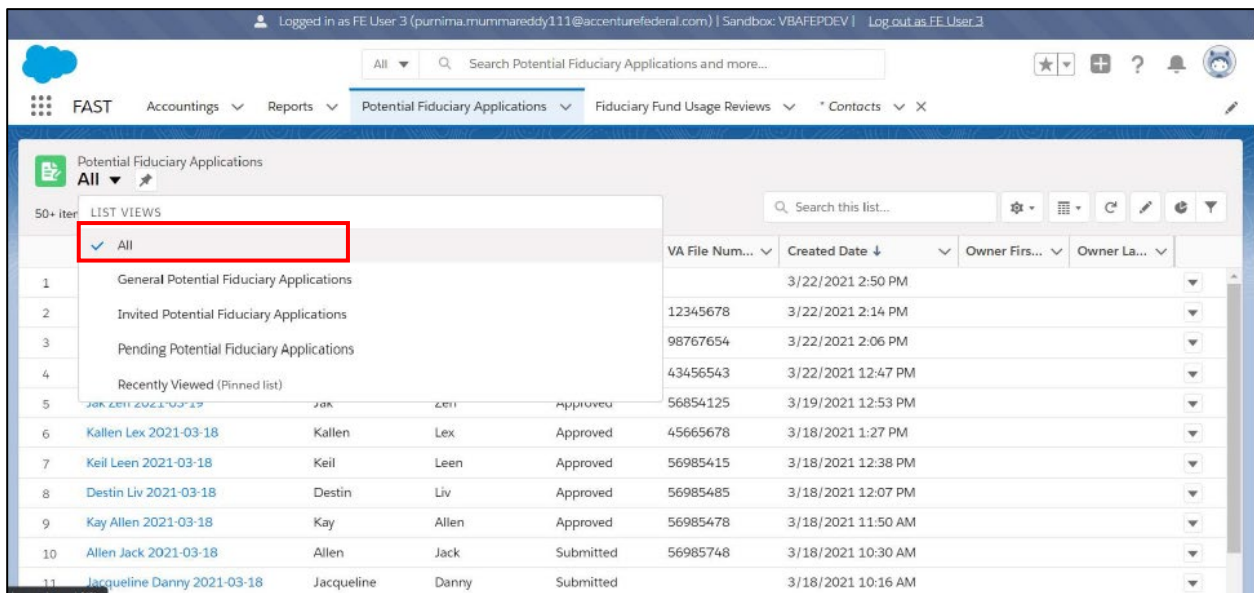


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3. Next, in the search box type “Potential Fiduciary Applications” then click the option to open the tab.



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



# Fiduciary Accountings Submission Tool (FAST)

## Training Job Aid

### Request Revisions on Potential Fiduciary Application

5. Then click the name of the recently submitted Fiduciary Application.


	Application Name	First N...	Last Name...	Status	VA File ...
1	<a href="#">Liu Wer 2021-06-04</a>	Liu	Wer	Revisions Requested	
2	<a href="#">Der Seed 2021-06-04</a>	Der	Seed	Rejected	
3	<a href="#">Jacqueline Oli 2021-06-04</a>	Jacqueline	Oli	Submitted	
4	<a href="#">Training Test 2021-06-04</a>	Training	Test	Submitted	

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 Test 2021-06-04**


Application Name  
Training Test 2021-06-04

Fiduciary Contact  
[Training Test](#)

Reviewer 

Social Security Number  
111111111


Email address of VA inviter

Invited by a Pension & Fiduciary Service 

Potential Fiduciary Application  
**Training Test 2021-06-04**

\* Application Name  
Training Test 2021-06-04

Fiduciary Contact  
Training Test

Reviewer  
 Nicole Nielsen FE User 1

Social Security Number  
111111111

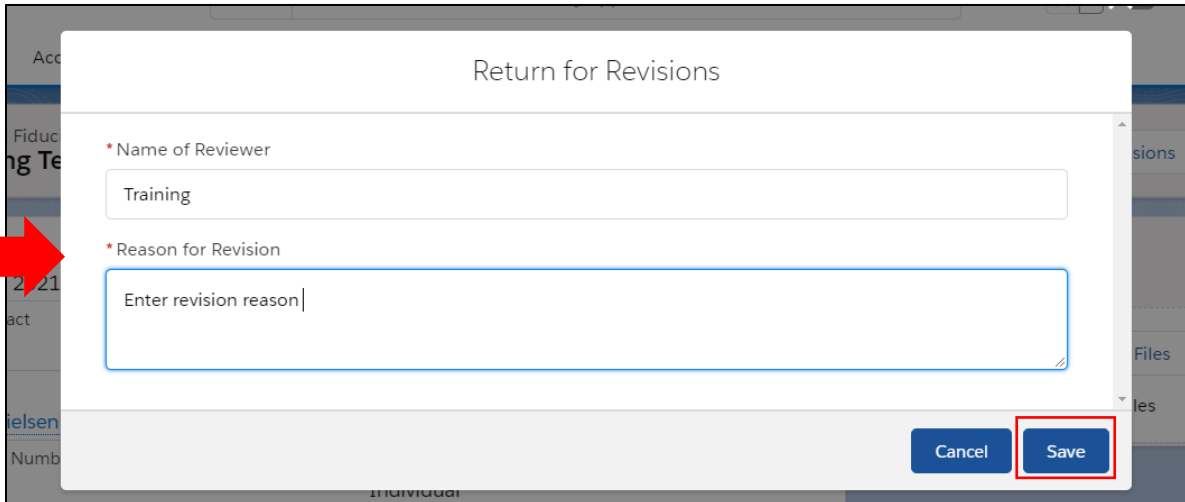
Email address of VA inviter

Cancel **Save**



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



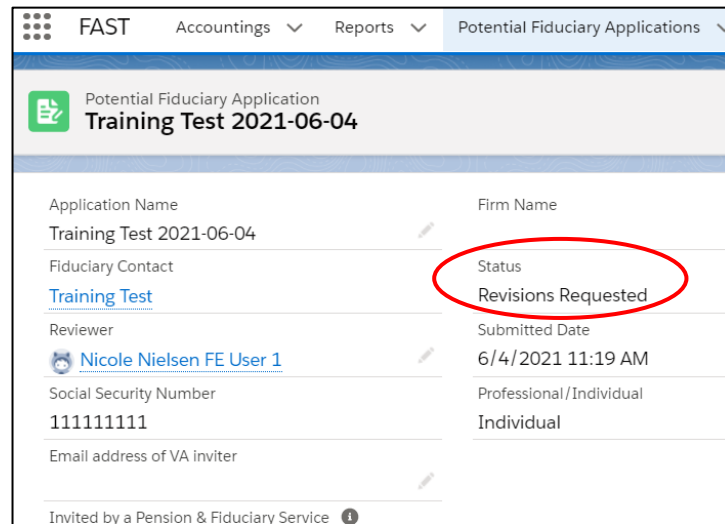
Return for Revisions

\* Name of Reviewer  
Training

\* Reason for Revision  
Enter revision reason

Cancel Save

8. The status field will change to **Revisions Requested**.



Application Name	Firm Name
Training Test 2021-06-04	
Fiduciary Contact	Status
<a href="#">Training Test</a>	Revisions Requested
Reviewer	Submitted Date
<a href="#">Nicole Nielsen FE User 1</a>	6/4/2021 11:19 AM
Social Security Number	Professional/Individual
111111111	Individual
Email address of VA inviter	

Invited by a Pension & Fiduciary Service ⓘ

## 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.

