

Fiduciary Accountings Submission Tool (FAST) Training Job Aid Fiduciary Fund Usage Review Deactivation



Objective

To provide user with guidance on how to deactivate a Fiduciary Fund Usage Review in FAST.



Audience

User: User with deactivation permission.

Prerequisite

The Fiduciary has submitted a partially completed Fiduciary Fund Usage Review or submitted the Fiduciary Fund Usage Review in error.

Instructions

1. Once in the Fiduciary Fund Usage Review record, you will need to assign yourself as a **reviewer**. Then click save.

The screenshot shows a web interface for a 'Fiduciary Fund Usage Review' record titled 'Demo 12-24-2020 3-24-2021'. The 'Review Information' section is expanded, showing a 'Reviewer' dropdown menu with a search box containing 'Search People...'. The 'Status' is 'Under Review'. Below this are three checkboxes: 'Surety Bond Outstanding?', 'Additional Bonds Purchased?', and 'Savings Bonds Cashed?'. To the right of these are labels for 'Reason for Incomplete' and 'Additional Remarks'. At the bottom, there is a 'Reporting Fields' section and two buttons: 'Cancel' and 'Save'. The 'Reviewer' dropdown and the 'Save' button are both highlighted with red boxes.



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- To deactivate the Fiduciary Fund Usage Review, you will need to click the drop-down arrow to the right of the incomplete button then click deactivate.

The screenshot shows the FAST interface with the 'Fiduciary Fund Usage Review' form. The form title is 'Demo 12-24-2020 3-24-2021'. The 'Incomplete' button has a dropdown arrow, and the 'Deactivate' option is highlighted in a red box. The form contains the following fields:

Field	Value
Starting Date	12/24/2020
Ending Date	3/24/2021
Signature of the Fiduciary	Training
Submitted Date	
Last Name of Veteran	Demo
Last Name of Beneficiary	
VA File Number	123456789
First Name of Beneficiary	Demo
Date	7/20/2021 1:07 PM
Field	Reviewer
User	Tracy Barker LIE User
Original V...	
New Value	Tracy Barker LIE User
Date	7/20/2021 1:07 PM
Field	Assigned Date

- Once the deactivate button is clicked, you will need to mark the check box to acknowledge the deactivation and provide a justification. Then click save.

The screenshot shows the 'Deactivate' dialog box. The 'I acknowledge this cannot be undone' checkbox is checked and highlighted in a red box. The 'Deactivation Justification' text area is also highlighted in a red box. The 'Save' button is highlighted in a red box. The dialog box contains the following text:

WARNING
This action cannot be undone. Deleting this Fiduciary Fund Usage Review will remove it from your view permanently.

* Fiduciary Fund Usage Review Name
Demo 12-24-2020 3-24-2021

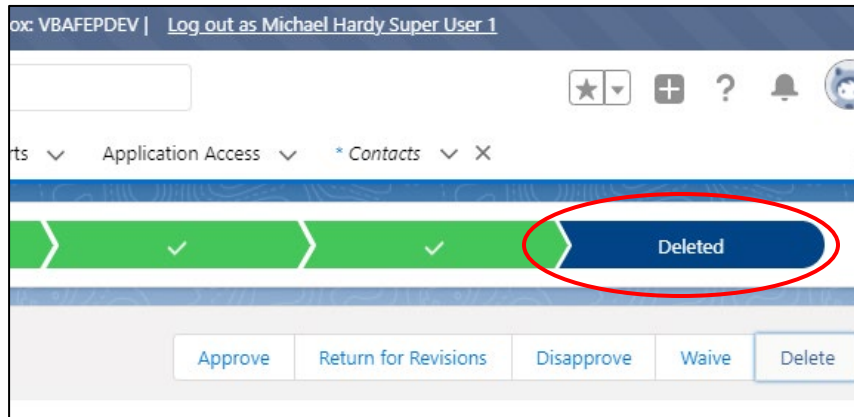
* Deactivation Justification

Cancel Save



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- The account status will then change to **deleted**.



Outcome

Once the user deactivates the Fiduciary Fund Usage Review it will only be viewable in the queue under the list view titled "Deactivated Accountings by VA".

