Objective
To provide the Fiduciary with steps on how to edit or delete a draft accounting.

Audience
User: Fiduciary

Prerequisite
The Fiduciary initiated a new accounting but never completed action to submit the accounting or the fiduciary’s previous accounting was approved creating an automatic draft accounting for next year’s accounting.

Instructions
1. Please choose one of the following options below:
   - For instructions on how to edit a draft accounting, please proceed to the next step.
   - For instructions on how to delete a draft accounting, click here.

2. In order to edit a draft accounting, you will need to access your accountings by clicking on Manage Accountings located on the FAST Homepage.
3. Under the list view option “Pending accountings”, you will be able to locate accountings in draft status.

![Pending Accountings](image)

4. Locate the draft accounting that will need to be edited, and then click the drop-down feature located next to draft status and select edit.

![Draft Accounting](image)

**Please note:** LIE’s may approve a submitted accounting with annotations in the approval letter for the next accounting period (changes to accounting period dates, beginning/ending balances etc.), that may not match the Draft accounting. In this instance please use the edit draft function.
5. Once the edit feature is selected the Fiduciary will be able to update the following information:

- Accounting Name
- VA File Number
- VA Fiduciary Hub
- Accounting start and end date
- First and Last Name of Beneficiary
- First and Last Name of Veteran
- Date Appointed
- End Date of Last Approved Accounting
- Ending Balance of Previous Accounting
- Total Estate at Beginning of Period

Once, the Fiduciary has updated the necessary information click save and proceed with the accounting process.
1. In order to **delete** a draft accounting, you will need to access your accountings by clicking on **Manage Accountings** located on the FAST Homepage.

2. Under the **list view** option **“Pending accountings”**, you will be able to locate accountings in **draft** status.

   **Please note:** Fiduciaries are only able to delete an accounting in **draft status** and cannot delete any accounting records that have been submitted in FAST.
3. In order to delete an accounting in draft status select the accounting you wish to delete.

4. Once the selected draft accounting is opened, use the drop-down option located next to the submit button. Select the option to delete.

Please note: Once the draft accounting is deleted it will no longer be viewable.

Outcome

The Fiduciary has successfully edited or deleted a draft accounting.