

# Fiduciary Accountings Submission Tool (FAST) Training Job Aid

## Requested Revisions on a Fiduciary Fund Usage Review



### Objective

To provide the Fiduciary with steps on how to review and implement the Legal Instrument Examiner (LIE) requested revisions.



### Audience

User: Fiduciary

### Prerequisite

The LIE has reviewed the Fid Fund Usage Review and requested revisions.

### Instructions

1. A **notification email** will be sent stating that the Fiduciary Fund Usage Review requires corrective action. Click on the hyperlink in the email to log into **FAST** to review the requested revision.

To log into **FAST** choose one of the following categories ***I am a Family Member or I am a VA Business Partner.***

U.S. Department of Veterans Affairs

AccessVA Securing your Access to VA IAM

AccessVA Home | About AccessVA | Contact Us

Welcome to AccessVA. A solution for accessing VA's online services.  
Click your category to see available applications you can sign in with:

- I am a Veteran
- I am a Family Member
- I am a Service Member
- I am a VA Business Partner
- I am a VA Employee or Authorized Contractor

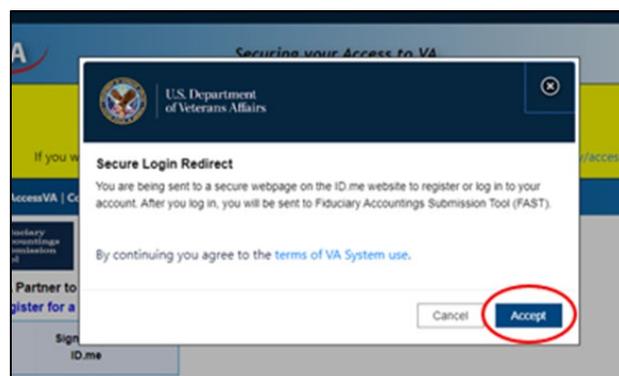
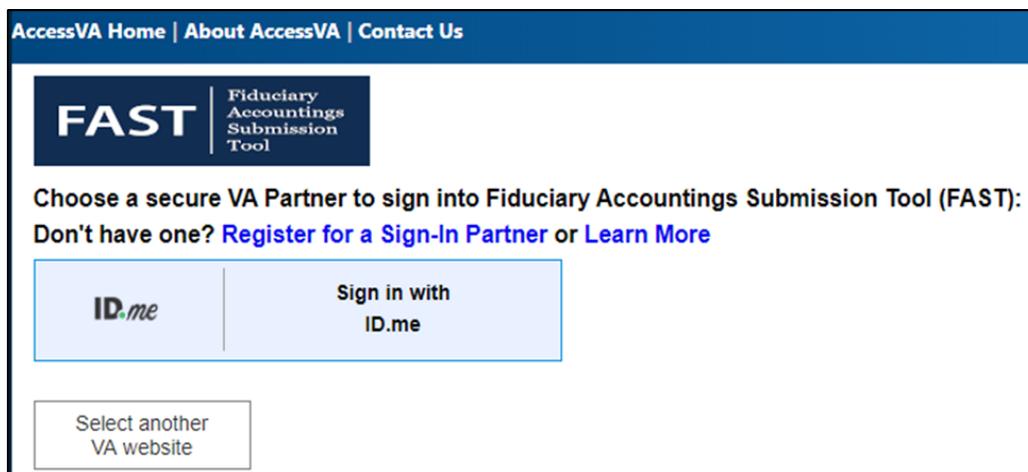


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2. Then click the **FAST** button.



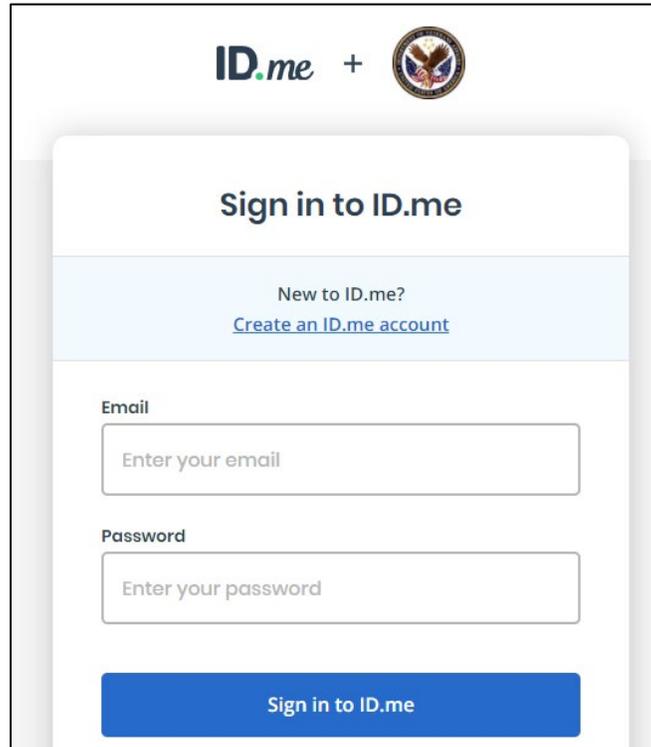
3. Click on the ID.me button then click **Accept**.



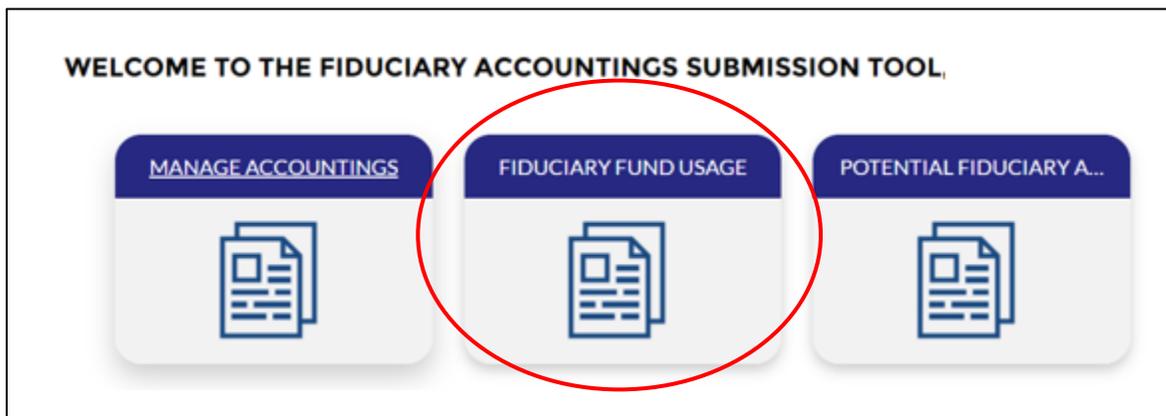
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4. Enter **email** and **password**.



5. Click **Fiduciary Fund Usage Review** on the FAST Homepage.



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- Under the list view **Pending Fiduciary Fund Usage Review**, click the name of the **Returned Revision**.

Fiduciary Fund Usage Reviews  
**Pending Fiduciary Fund Usage Review** ▼

2 Items • Sorted by Fiduciary Fund Usage Review Name • Filtered by My fiduciary fund usage reviews - Status • Updated a few seconds ago

Search this list...

Fiduciary Fund Usage Revi...	Status	Created Date	VA Fiduciary H...	VA File Nu...	Last N...	First N...
1 <b>Training 2-12-2021 5-12-2021</b>	Revisions Requested	6/9/2021 1:33 PM	Columbia 319	123456789	Training	Demo

- Review the **revisions** requested and make the **necessary** changes.
  - To edit **General Request Information**, select the pencil icon.

Fiduciary Fund Usage Review  
**Training 2-12-2021 5-12-2021**

General Request Information

Fiduciary Fund Usage Review Name Training 2-12-2021 5-12-2021	First Name of Veteran Demo
Name of Fiduciary Training Demo	Middle Name of Veteran T
VA Fiduciary Hub Columbia 319	Last Name of Veteran Training
Starting Date 1/5/2021	VA File Number 123456789
Ending Date 4/5/2021	First Name of Beneficiary Training
Signature of the Fiduciary Training Demo	Last Name of Beneficiary Demo
Submitted Date 6/9/2021	Status Revisions Requested
Reason for Incomplete	Revisions Requested Reason for revision



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## Requested Revisions on a Fiduciary Fund Usage Review

8. After making corrective action to the returned revision, you will need to re-acknowledge and re-submit the Fid Fund Usage Review. At the top of the screen click the **Acknowledgement** button to **re-acknowledge** the Fid Fund Usage Review.

The screenshot shows the top of the FAST interface. On the left, there is a gear icon and the text "Fiduciary Fund Usage Review Training 1-5-2021 4-5-2021". On the right, there are two buttons: "Acknowledgement" (underlined) and "Submit". Below this, there is a section titled "General Request Information" with a dropdown arrow. It contains two columns of input fields: "Fiduciary Fund Usage Review Name" (value: Training 1-5-2021 4-5-2021) and "First Name of Veteran" (value: Training); "Name of Fiduciary" (value: Forrest Gump) and "Middle Name of Veteran" (value: Training). To the right of this section is a "Files (0)" area with an "Add Files" button and an "Upload Files" button, with the text "Or drop files" below it.

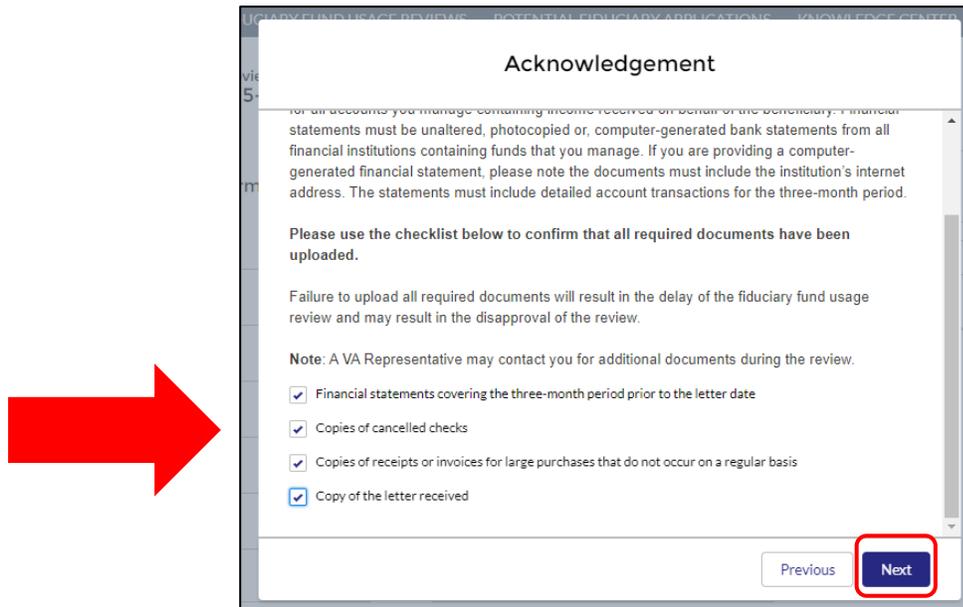
9. Review the **Contact Info** section. If the **information** in the section is correct click **Next**.

The screenshot shows the "Acknowledgement" section of the FAST interface. It features a "Contact Info" section with the instruction: "Please confirm your contact information. Ensure your Address information is filled out correctly. If any changes are required, please update accordingly." Below this are five input fields: "First Name" (value: Forrest), "Last Name" (value: Gump), "Email" (value: Test.email@gmail.com), "Phone Number" (value: 1234567890), and "Address (All fields below must be completed)". A blue "Next" button is located at the bottom right of the form, highlighted with a red box.



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10. In the **'Acknowledgement of Attached Documents'** section mark the checkboxes and click **Next**. Then in the Legal Acknowledgements section, mark the checkboxes and click Next.



The screenshot shows a web form titled "Acknowledgement". The form contains the following text:

For all accounts you manage containing income received on behalf of the beneficiary, financial statements must be unaltered, photocopied or, computer-generated bank statements from all financial institutions containing funds that you manage. If you are providing a computer-generated financial statement, please note the documents must include the institution's internet address. The statements must include detailed account transactions for the three-month period.

Please use the checklist below to confirm that all required documents have been uploaded.

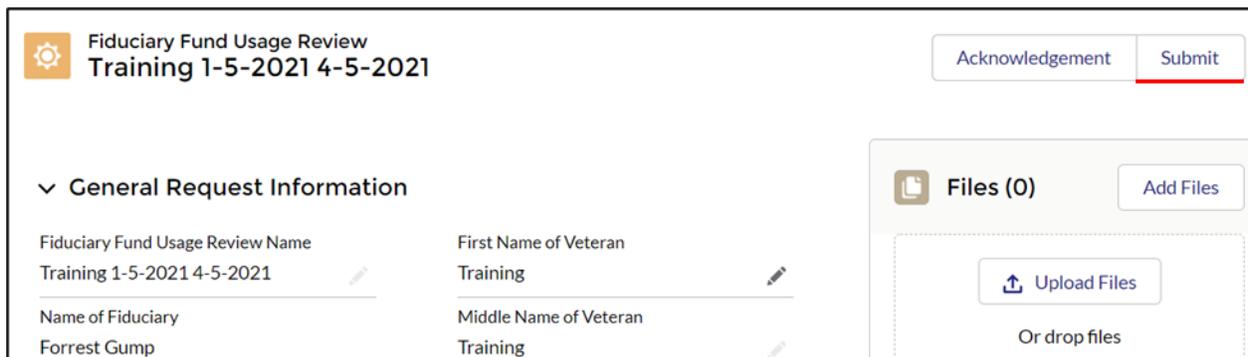
Failure to upload all required documents will result in the delay of the fiduciary fund usage review and may result in the disapproval of the review.

Note: A VA Representative may contact you for additional documents during the review.

- Financial statements covering the three-month period prior to the letter date
- Copies of cancelled checks
- Copies of receipts or invoices for large purchases that do not occur on a regular basis
- Copy of the letter received

At the bottom right of the form, there are two buttons: "Previous" and "Next". The "Next" button is highlighted with a red box, and a large red arrow points to it from the left.

11. After **re-acknowledgement**, click the **Submit** button.



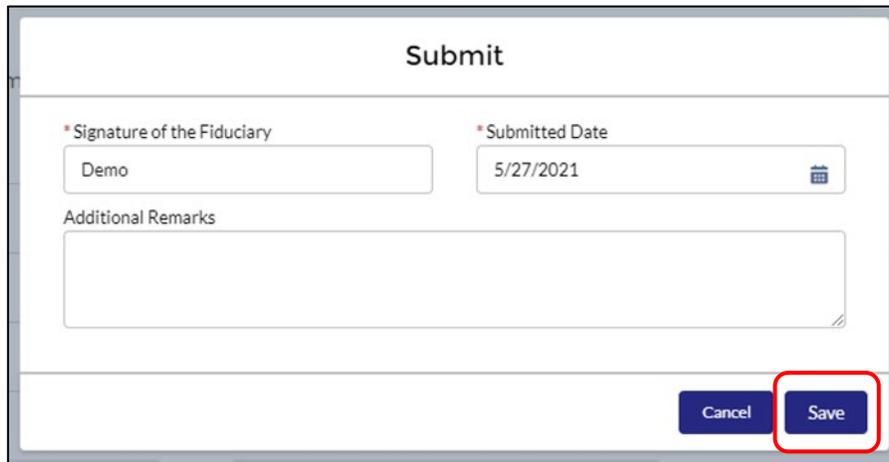
The screenshot shows the "Fiduciary Fund Usage Review" form. The title is "Fiduciary Fund Usage Review Training 1-5-2021 4-5-2021". There are two tabs at the top right: "Acknowledgement" and "Submit", with "Submit" being the active tab. The form is divided into sections:

- General Request Information**:
  - Fiduciary Fund Usage Review Name: Training 1-5-2021 4-5-2021
  - First Name of Veteran: Training
  - Name of Fiduciary: Forrest Gump
  - Middle Name of Veteran: Training
- Files (0)**:
  - Add Files
  - Upload Files
  - Or drop files

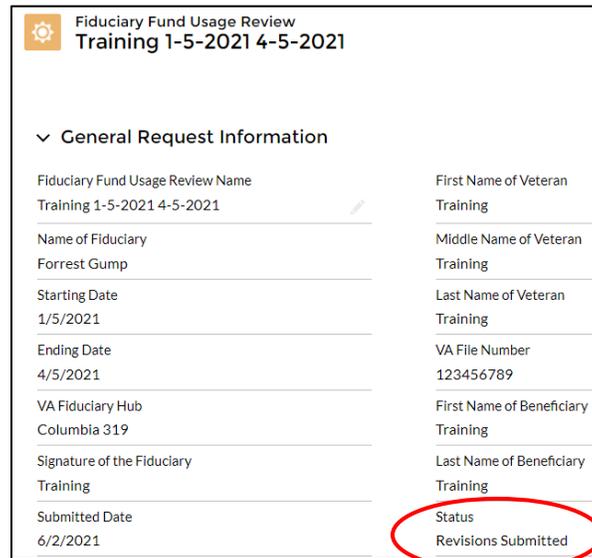


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12. Input your **signature** and any **comments** that are necessary and click **Save**.



13. Once the Fiduciary Fund Usage Review has been re-submitted, the status will change to **Revisions Submitted**.



Fiduciary Fund Usage Review Training 1-5-2021 4-5-2021	
▼ General Request Information	
Fiduciary Fund Usage Review Name Training 1-5-2021 4-5-2021	First Name of Veteran Training
Name of Fiduciary Forrest Gump	Middle Name of Veteran Training
Starting Date 1/5/2021	Last Name of Veteran Training
Ending Date 4/5/2021	VA File Number 123456789
VA Fiduciary Hub Columbia 319	First Name of Beneficiary Training
Signature of the Fiduciary Training	Last Name of Beneficiary Training
Submitted Date 6/2/2021	Status Revisions Submitted

## Outcome

The Fiduciary has provided and submitted revisions. The LIE will review and provide a disposition.

