Objective
To provide the Fiduciary with steps on how to filter accountings to identify appropriate accounting to select or review

Audience
User: Fiduciary

Prerequisite
The Fiduciary has navigated the FAST homepage and features.

Instructions
1. Access FAST Homepage
2. Click Manage Accountings
3. Scroll down to accounting listview. If the user would like to view **All Accountings** click [ListView 1](#).

If the user would like to view **Approved Accountings** click [ListView 2](#). If the user would like to view **Pending Accountings** click [ListView 3](#). If the user would like to view **Recently Viewed Accountings** click [ListView 4](#). If the user would like to view **Submitted/Under Review Accountings** click [ListView 5](#).
Fiduciary Accountings Submission Tool (FAST) Training Job Aid

Filter Existing Accountings

Listview 1: All Accountings

1. Filter listview for All Accountings. Viewing a filtered list for All Accountings is appropriate when a Fiduciary intends to view all accountings that have been created across all completion statuses. Accountings can be in the following statuses: (1) Submitted, (2) Draft, (3) Under Review, (4) Approved – Final Approval, and (5) Approved – Docs Needed.
Listview 2: Approved Accountings

1. Filter listview for Approved Accountings. Viewing a filtered list for Approved Accountings is appropriate when a Fiduciary intends to view all accountings that have been approved by the assigned LIE. Accountings can be in the following statuses: (1) Approved – Docs Needed, (2) Approved – Unlock Requested, (3) Approved – Final Approval.
Listview 3: Pending Accountings

1. **Filter** listview for **Pending Accountings**. Viewing a filtered list for Pending Accountings is appropriate when a Fiduciary intends to view accountings where actions are required by either the Fiduciary or the LIE (reviewer). Accountings can be in the following statuses: (1) Draft, (2) Approved – Docs Needed, (3) Revisions Requested.
Listview 4: Recently Viewed Accountings

1. **Filter** listview for **Recently Viewed Accountings**. Viewing a filtered list for Recently Viewed Accountings is appropriate when a Fiduciary intends to view all accountings that have been recently viewed.
Listview 5: Submitted/Under Review Accountings

1. Filter listview for Submitted/Under Review Accountings. Viewing a filtered list for Submitted/Under Review is appropriate when a Fiduciary intends to view all accountings that have been submitted for review or accountings that a LIE (reviewer) is currently reviewing. Accountings can be in the following statuses: (1) Submitted, (2) Revisions Submitted, and (3) Under Review.

Outcome

The Fiduciary will view all accountings and select an accounting from a listview.