

# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)



## Objective

To provide the Potential Fiduciary with steps on how to self-register for the Fiduciary Accounting Submission Tool (FAST), so the Potential Fiduciary can submit their electronic Form 21P-4703 VA Fiduciary Agreement to be vetted as a potential fiduciary.



## Audience

User: Potential Fiduciary

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## Prerequisite

The self-registration process allows the Potential Fiduciary to submit their electronic Form 21P-4703 VA Fiduciary Agreement to be vetted as a potential fiduciary.

## Instructions

1. To Self-register please enter the [Access VA website](#)

You can only access FAST under the following categories:

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

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.

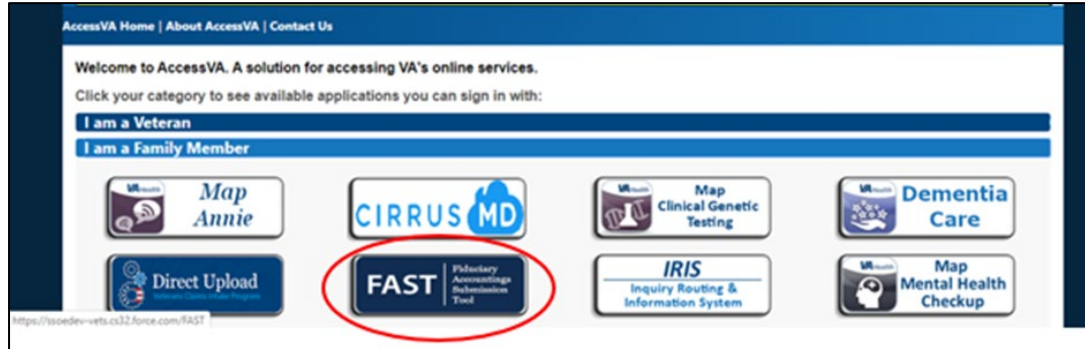
Click your category to see available applications you can sign in with:

- 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

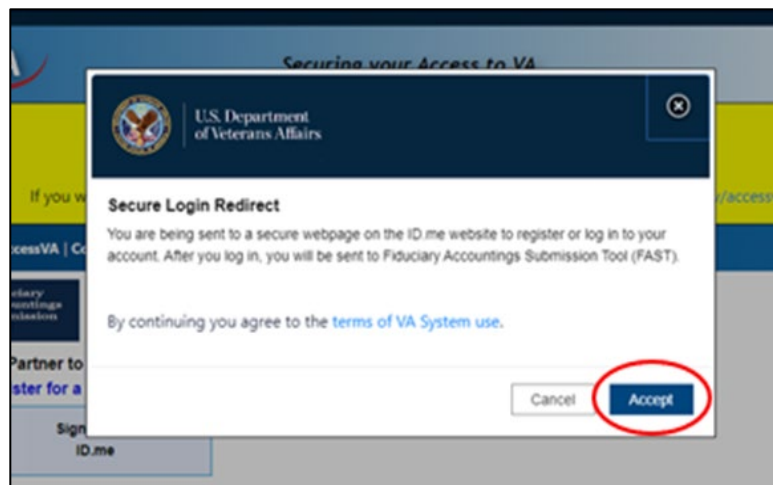
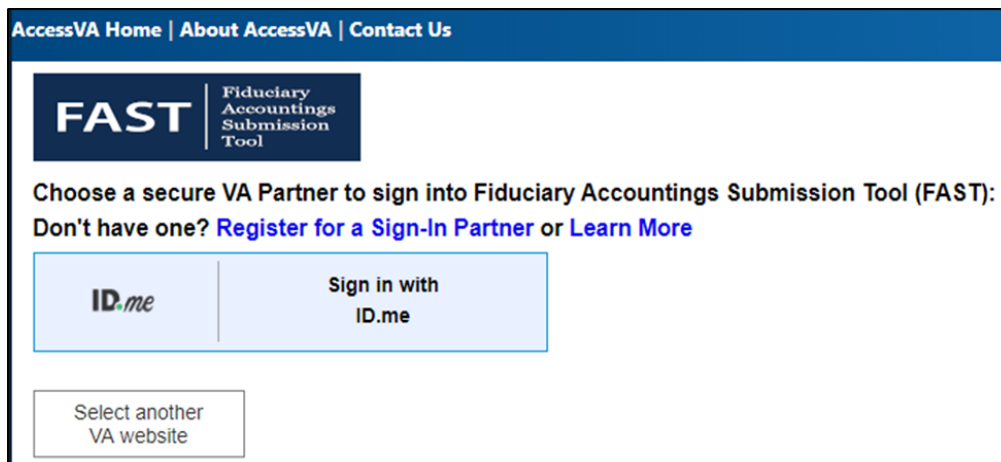


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2. Click the **FAST** button.

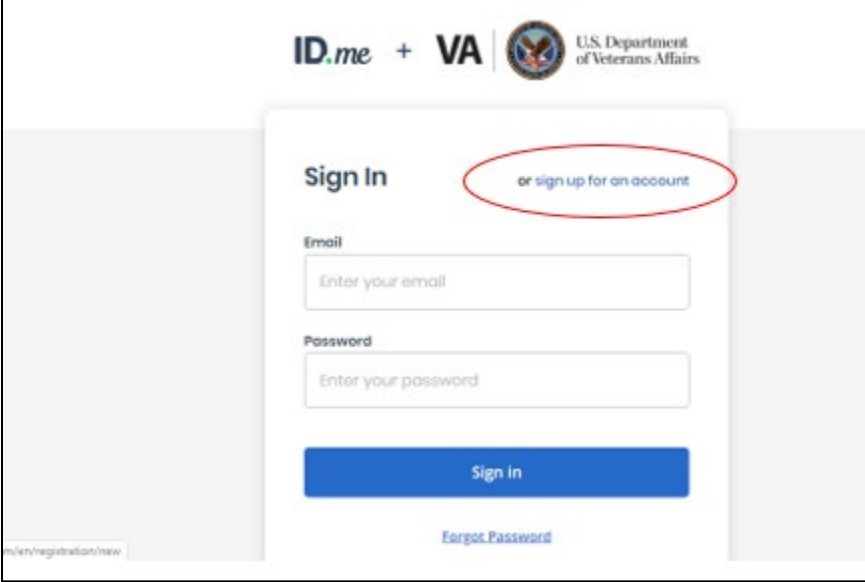


3. Click on the ID.me button then click **Accept**.



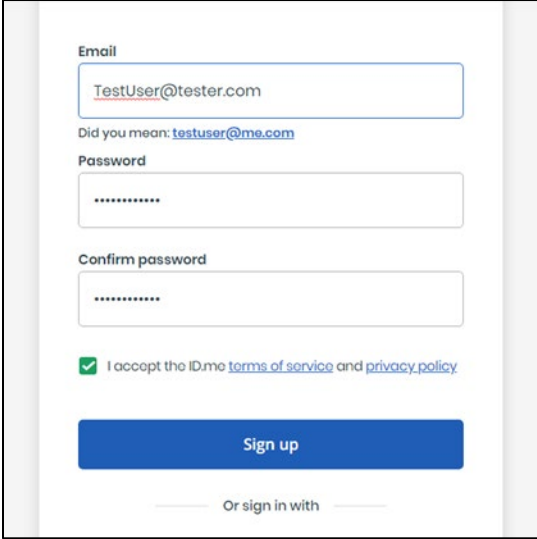
# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

4. Click the button **Sign-up for an account**



The screenshot shows the ID.me + VA sign-in page. At the top, there are logos for ID.me, VA, and the U.S. Department of Veterans Affairs. Below the logos, there is a 'Sign In' section with two input fields: 'Email' (with placeholder text 'Enter your email') and 'Password' (with placeholder text 'Enter your password'). A blue 'Sign In' button is positioned below the password field. To the right of the 'Sign In' text, the link 'or sign up for an account' is circled in red. Below the 'Sign In' button, there is a 'Forgot Password' link. The URL 'm/en/registration/new' is visible in the bottom left corner.

5. Fill out the fields (email, password, and confirm password). Then click the **Sign-up** button.

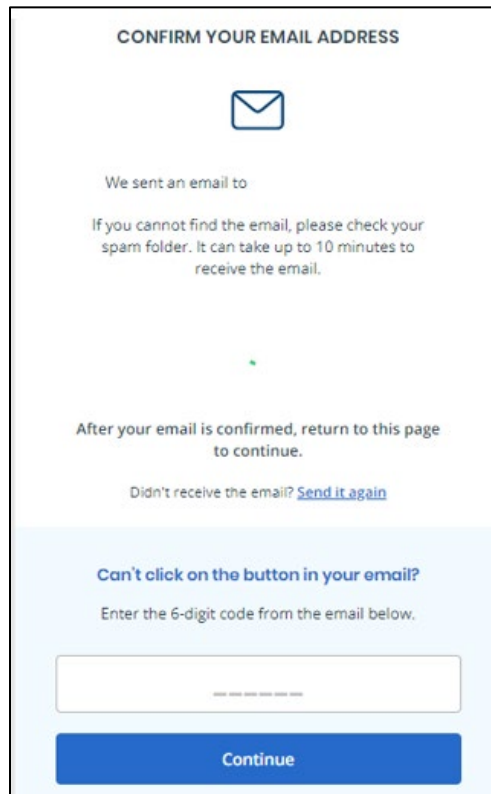


The screenshot shows the ID.me registration form. The 'Email' field contains 'TestUser@tester.com'. Below the email field, there is a suggestion: 'Did you mean: testuser@me.com'. The 'Password' field and 'Confirm password' field are both filled with asterisks. Below the password fields, there is a checked checkbox and the text 'I accept the ID.me [terms of service](#) and [privacy policy](#)'. A blue 'Sign up' button is positioned below the checkbox. At the bottom, there is a link 'Or sign in with'.




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6. Access the email provided on the previous screen; a link will be sent, and you will need to confirm your email address.



CONFIRM YOUR EMAIL ADDRESS



We sent an email to

If you cannot find the email, please check your spam folder. It can take up to 10 minutes to receive the email.

After your email is confirmed, return to this page to continue.

Didn't receive the email? [Send it again](#)

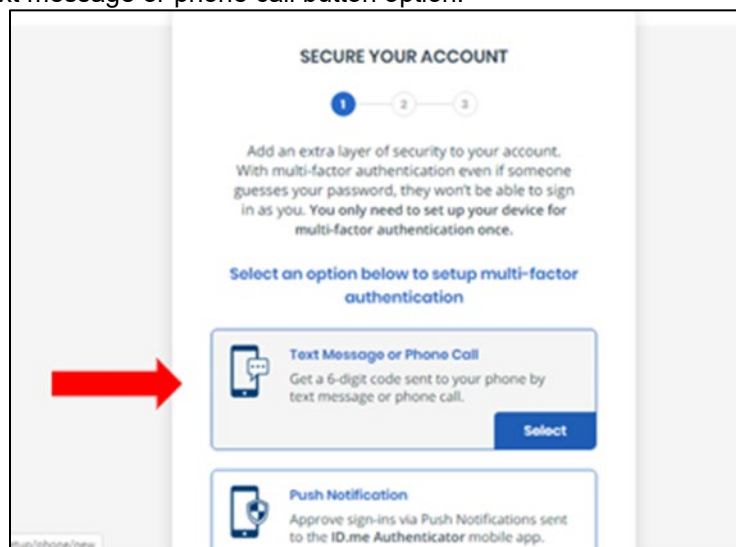
Can't click on the button in your email?

Enter the 6-digit code from the email below.

-----

Continue

7. Select the text message or phone call button option.





SECURE YOUR ACCOUNT

1 — 2 — 3

Add an extra layer of security to your account. With multi-factor authentication even if someone guesses your password, they won't be able to sign in as you. You only need to set up your device for multi-factor authentication once.

Select an option below to setup multi-factor authentication

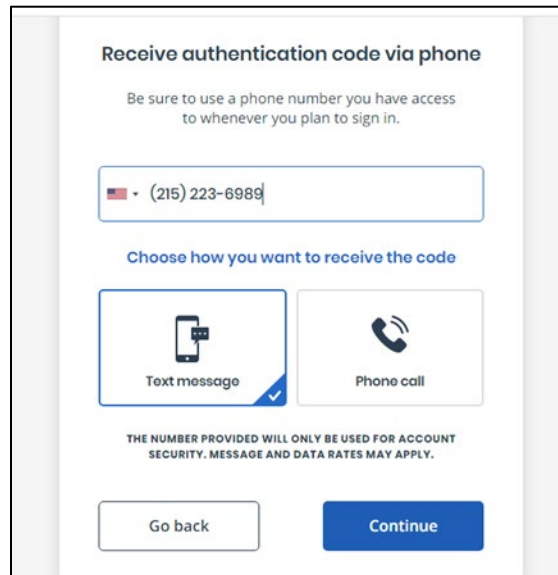
 **Text Message or Phone Call**  
Get a 6-digit code sent to your phone by text message or phone call. **Select**

 **Push Notification**  
Approve sign-ins via Push Notifications sent to the ID.me Authenticator mobile app.



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

8. Once you enter your phone number, select whether you would prefer to receive a **text message or an automated phone call** to receive the authentication code. Then click **continue**. On the next page, you will type in the code that you received.



Receive authentication code via phone

Be sure to use a phone number you have access to whenever you plan to sign in.

(215) 223-6989

Choose how you want to receive the code

Text message

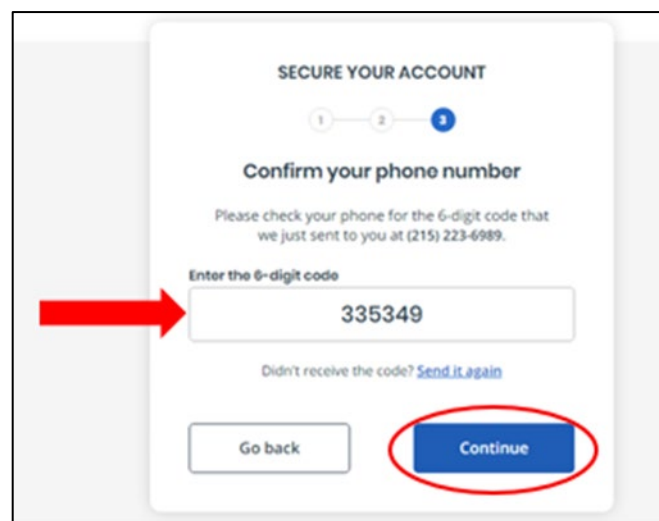
Phone call

THE NUMBER PROVIDED WILL ONLY BE USED FOR ACCOUNT SECURITY. MESSAGE AND DATA RATES MAY APPLY.

Go back Continue

*Standard message and data rates may apply*

9. Once you enter the **6-digit code**, click **“continue”**. (If you did not receive the 6-digit code select the **“send it again”** option)



SECURE YOUR ACCOUNT

1 2 3

Confirm your phone number

Please check your phone for the 6-digit code that we just sent to you at (215) 223-6989.

Enter the 6-digit code

335349

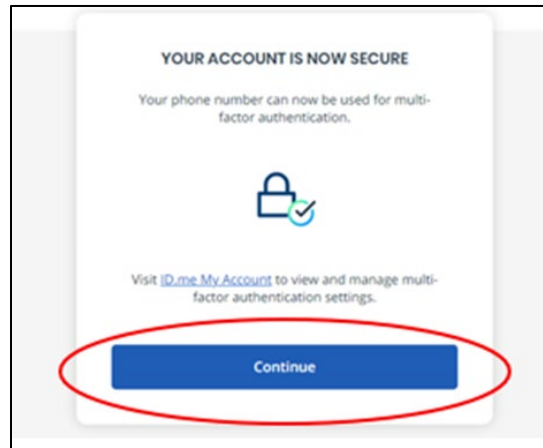
Didn't receive the code? [Send it again](#)

Go back Continue



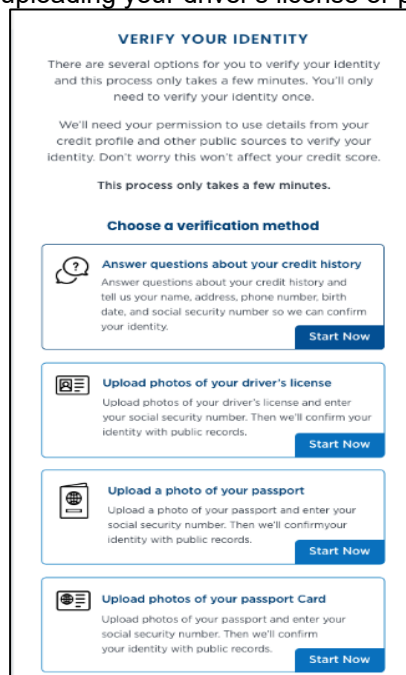
# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

10. Your account will then be secured once you click continue.



11. Select the option you'd like to use to **verify** your identity. Please note you must complete this step if you wish to **access** sensitive information.

- For steps on answering questions about your credit history click [here](#)  
*(Please note: this process does not involve checking an individual's credit or performing a "hard pull" of credit data. There is no impact to an individual's credit score or credit rating as part of this identity verification process. ID.me does not store any credit profile information, examine credit worthiness, or impact an individual's credit score.)*
- For steps on uploading your driver's license or passport click [here](#)



**VERIFY YOUR IDENTITY**

There are several options for you to verify your identity and this process only takes a few minutes. You'll only need to verify your identity once.

We'll need your permission to use details from your credit profile and other public sources to verify your identity. Don't worry this won't affect your credit score.

This process only takes a few minutes.

**Choose a verification method**

- Answer questions about your credit history**  
Answer questions about your credit history and tell us your name, address, phone number, birth date, and social security number so we can confirm your identity. [Start Now](#)
- Upload photos of your driver's license**  
Upload photos of your driver's license and enter your social security number. Then we'll confirm your identity with public records. [Start Now](#)
- Upload a photo of your passport**  
Upload a photo of your passport and enter your social security number. Then we'll confirm your identity with public records. [Start Now](#)
- Upload photos of your passport Card**  
Upload photos of your passport and enter your social security number. Then we'll confirm your identity with public records. [Start Now](#)



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

## Credit history

If you choose to verify your identity using security questions, you will be prompted to enter your basic personal information (first name, middle name, last name, suffix, date of birth, etc.). Enter this information and then [click](#) "Continue".

### Enter your personal information

[What does this mean?](#)

We'll use this information, along with details from your credit profile, to verify your identity. We take the security of your information seriously and never share your personal information or credit history with anyone else. Verifying your identity with us won't change your credit score.

If you've frozen your credit report, we'll send you a personal identification number (PIN) so you can share your free credit report with VA.gov. You only need to share your credit report once.

[Close](#)

**First Name\***

**Middle Name**

**Last Name\***

**Suffix**

**Social Security Number\***

**Date of birth\***

Month  Day  Year



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

12. Enter your current home address information and click next. Then enter and confirm your **Social Security Number (SSN)**.

**VERIFY YOUR IDENTITY**

1 2 3 4 5

Enter your most recent home address

**Address Line 1\***  
Enter address No P.O. boxes

**Address Line 2**  
Enter address Apartment Unit, Suite # Optional

**City\***  
Enter city

**State\*** Select state **Zip Code\*** Enter zip code

Back Next

[Privacy Policy](#)

**ENTER YOUR SOCIAL SECURITY NUMBER**

Your social security number is needed to verify your identity. We will never reveal your personal information without your permission.

**Social Security Number**  
•••••••••• SHOW

Continue

Go back

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)





# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

13. Next, confirm your phone number. On the screen below, you can choose to verify using your **mobile phone or your home phone**. The number you choose should be your “phone number of record,” meaning the phone number must be directly associated with your name.

**VERIFY YOUR IDENTITY**

1 2 3 4 5

**Enter your phone number**

We'll verify your identity by making sure the phone number you enter matches the number in your credit profile, or we'll check with your mobile carrier.

**Select the type of phone you have**

If you have a smart phone with a web browser, we'll text you a link you can open. If you don't have a smart phone, we'll call you.

Smartphone with a web browser

Home phone or cell phone without a web browser

Enter your smartphone number

(123)456-7890

Enter your home phone number

(098)765-4321 Optional

Back Continue



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

14. You will be presented with a summary of all the information that was collected in the previous screens. To change any incorrect information, click the “Edit” button on the right side of the highlighted sections.

VERIFY YOUR IDENTITY

1 — 2 — 3 — 4 — 5

Confirm your information

We will securely use the following information to verify your identity against trusted sources.

What does this mean? ^

**Personal Information** EDIT

First Name Test

Middle Name

Last Name Test

Date of birth 01/23/1988

**Home address** EDIT

Street 1 Testa Place

City Test

State CT

Zip Code 12345

**Phone number** EDIT

Mobile Phone 202-555-5555

The information I've provided is correct, and I accept the use of [Fair Credit Reporting Act](#) data to verify my identity.

What is The Federal Fair Credit Reporting Act? ^

Back Continue

Click the checkbox to attest that all the information is accurate and accept the use of Fair Credit Reporting Act (FCRA) data to verify your identity.



# Fiduciary Accountings Submission Tool (FAST)

## Training Job Aid

### Self-Registration (Potential Fiduciary Application)

15. Your information will be submitted for verification. If approved, you will see a screen that lists three questions about your history. Select the correct answers using the respective radio button to the left of each answer. When each question has been answered, click “Continue”

*Please note the below screenshot is not reflective of anyone’s actual credit information. This example is for demonstration purposes only.*

**Answer your verification questions**

The following questions are based on your credit profile and financial activity.

What does this mean? ^

1. According to your credit profile, you may have opened a mortgage loan in or around November 2011. Please select the lender to whom you currently make your mortgage payments. If you do not have a mortgage, select "None of the above".

- Rock Financial Corp
- First Nationwide Mtg
- Inland Mortgage
- Household Bank
- None of the above

2. According to your credit profile, you may have opened a Bank of America credit card. Please select the year in which your account was opened.

- 2009
- 2011
- 2013
- 2014
- None of the above

3. Which of the following is a current or previous employer? If there is not a matched employer name, select "None of the above".

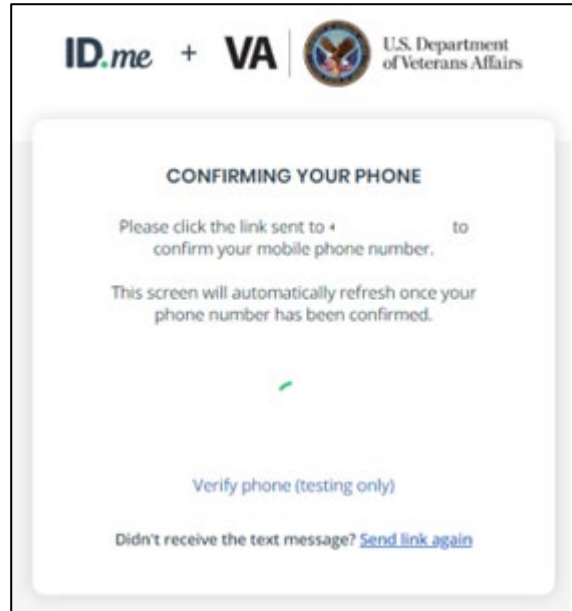
- Saunders Manufacturing Co.
- Landmark Services
- Cintas Corp
- Northrop Grumann
- None of the above

**Continue**

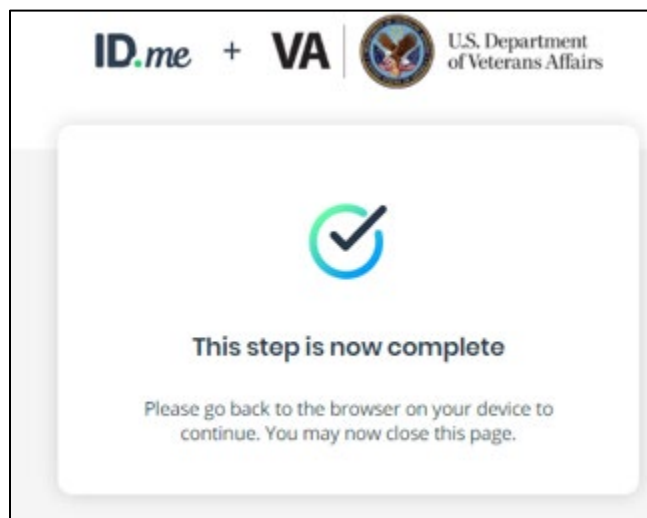


# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

16. A link will be sent to your phone asking you to verify your phone number. The below screen is an example of what shows when you click on the link sent to your phone.

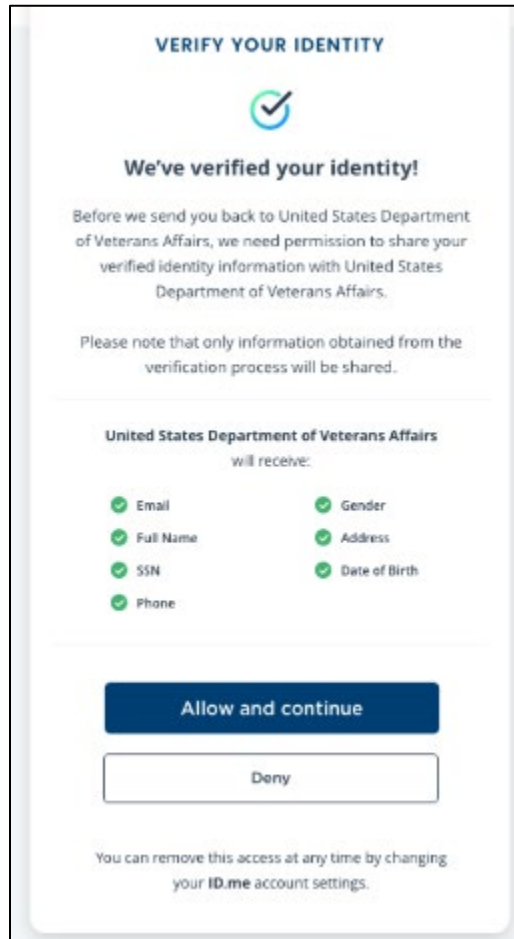


17. Once you have confirmed your phone number a complete screen will appear; as seen below. Please then return to the browser on your device, where you will see the screen shot for step 18.




# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

18. If you answered correctly, your identity will be verified, and you'll see a page that lists the information being requested from our partner and asks you to consent to the release of that information.



**VERIFY YOUR IDENTITY**



**We've verified your identity!**

Before we send you back to United States Department of Veterans Affairs, we need permission to share your verified identity information with United States Department of Veterans Affairs.

Please note that only information obtained from the verification process will be shared.

**United States Department of Veterans Affairs**  
will receive:

- Email
- Full Name
- SSN
- Phone
- Gender
- Address
- Date of Birth

**Allow and continue**

Deny

You can remove this access at any time by changing your ID.me account settings.

To proceed to the second self-registration phase please click [here](#)



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

## Verify using Driver's License or Passport

If you choose to verify your identity for VA.gov using your driver's license or passport, you will be prompted with two options:

- Take a picture with my phone
- Upload a picture from my computer

**VERIFY WITH YOUR DRIVER'S LICENSE**

1 — 2 — 3

Choose how to submit photos

In order to verify your identity, please make sure:

1) Your driver's license is up-to-date  
2) Take photo in a well-lit flat surface

Take photo with your phone

YOUR MOBILE PHONE MUST HAVE A CAMERA AND A WEB BROWSER.

OR

Upload photo from your computer

Go back

**VERIFY WITH YOUR PASSPORT**

1 — 2 — 3

Choose how to submit photos

In order to verify your identity, please make sure:

1) Your passport is up-to-date  
2) Take photo in a well-lit flat surface

Take photo with your phone

YOUR MOBILE PHONE MUST HAVE A CAMERA AND A WEB BROWSER.

OR

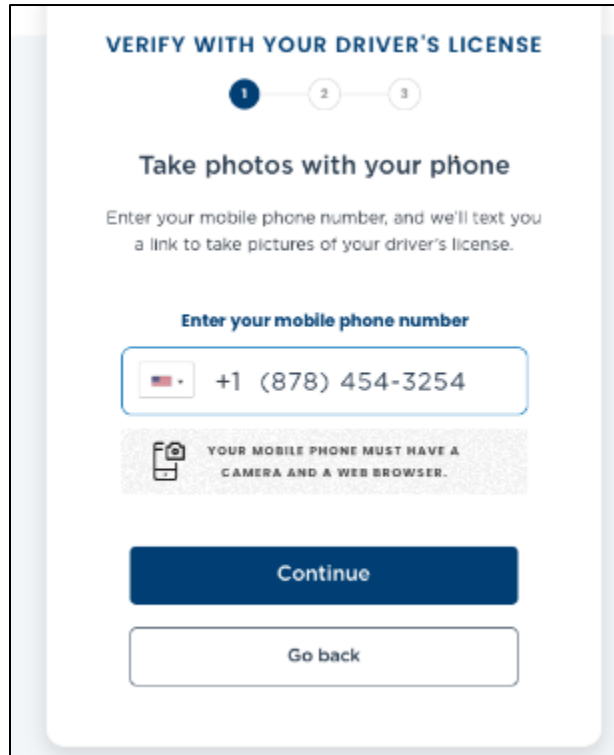
Upload photo from your computer

Go back



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

1. If you choose to take a picture with your phone, you'll be prompted to enter your mobile phone number. After entering your phone number, click “**continue**”. If you chose to upload the document from your computer instead of taking the picture with your phone, you will be asked to confirm your phone number before reviewing the information for accuracy. If you completed the 2-factor authentication enrollment on your phone, the phone number will be pre-filled for you.



VERIFY WITH YOUR DRIVER'S LICENSE

1 — 2 — 3

Take photos with your phone

Enter your mobile phone number, and we'll text you a link to take pictures of your driver's license.

Enter your mobile phone number

+1 (878) 454-3254

YOUR MOBILE PHONE MUST HAVE A CAMERA AND A WEB BROWSER.

Continue

Go back

***Use these guidelines to take a clean photo of your driver's license:***

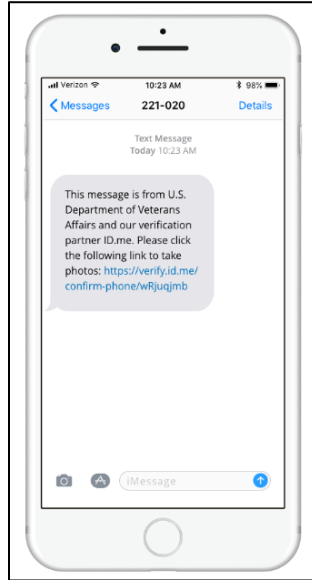
- ***Use landscape orientation***
- ***Turn off the flash on your camera to reduce glare***
  - ***Use a dark background***
  - ***Take the photo on a flat surface***
- ***Take the photo straight on and not at an angle***

***Glare, orientation, and other objects in the frame of the picture can affect whether the license is accepted for verification. Improper photos may result in the user having to take additional steps to verify their identity.***

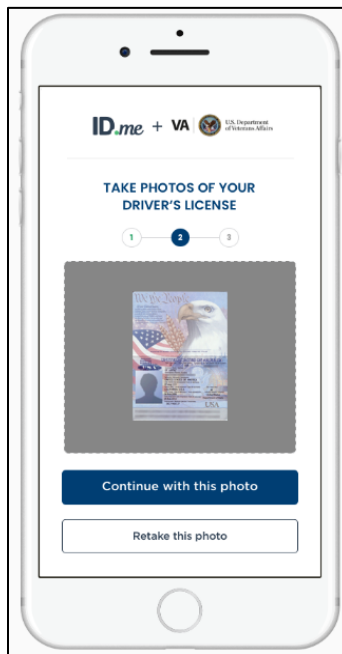


# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

2. You will receive a text message on your phone. This will open the ID.me window on your phone, which will allow you to take a picture of your driver's license and submit it for verification.



3. Using your phone, take a picture of your **driver's license or passport**. It will automatically upload the photo to ID.me. Check the image to make sure it fits the criteria listed and then tap **“Submit photo.”**





# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

4. You will then receive a message indicating your driver's license or passport photo has been uploaded.



5. Next, you will need to enter your current home address information, and then enter and confirm your SSN.

A screenshot of a web form titled "VERIFY YOUR IDENTITY". At the top, there is a progress indicator with five steps, where step 2 is highlighted. Below the title, it says "Enter your most recent home address". The form has several input fields: "Address Line 1\*" with a "No P.O. boxes" note, "Address Line 2" with an "Apartment Unit, Suite # Optional" note, "City\*", "state\*" (a dropdown menu), and "Zip Code\*" (with "Enter zip code" text). At the bottom, there are "Back" and "Next" buttons. A "Privacy Policy" link is at the very bottom.

# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

**ENTER YOUR SOCIAL SECURITY NUMBER**

Your social security number is needed to verify your identity. We will never reveal your personal information without your permission.

**Social Security Number**

•••••••• [SHOW](#)

[Continue](#)

[Go back](#)

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

- Next, confirm your phone number. On the screen below, you can choose to verify using your mobile phone or your home phone. The number you choose should be your “phone number of record,” meaning the phone number must be directly associated with your name.

**VERIFY YOUR IDENTITY**

1 — 2 — 3 — 4 — 5

**Enter your phone number**

We'll verify your identity by making sure the phone number you enter matches the number in your credit profile, or we'll check with your mobile carrier.

**Select the type of phone you have**  
If you have a smart phone with a web browser, we'll text you a link you can open. If you don't have a smart phone, we'll call you.

Smartphone with a web browser

Home phone or cell phone without a web browser

Enter your smartphone number

(123) 456-7890

Enter your home phone number

(098) 765-4321 [Optional](#)

[Back](#) [Continue](#)



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

- Next, you will be presented with a summary of all the information collected from your passport and any manually entered information. To make changes, simply click the “Edit” button on the right side of the highlighted sections.

**VERIFY YOUR IDENTITY**

1 — 2 — 3 — **4** — 5

**Confirm your information**

We'll verify the information you've entered with details from your credit profile.

[What does this mean?](#)

**Full legal name** EDIT

First name: Caleb

Middle name: Michael

Last name: Owens

Gender: Male

Birth date: 08/30/1972

**Current home address** EDIT

Street address: 123 Main Avenue Southwest

City: AnyCityName

State: CA

Zip code: 11111

**Phone** EDIT

Mobile phone number: (123) 456-7890

I attest that the information I have provided is correct and accept the use of Fair Credit Reporting Act data to verify my identity.

[What is the Federal Fair Credit Reporting Act?](#)

We'll need your permission to see information in your credit profile as part of our verification process. The Federal Fair Credit Reporting Act (FCRA) promotes the accuracy, fairness, and privacy of information from consumer reporting agencies.

[Learn more about the FCRA.](#)

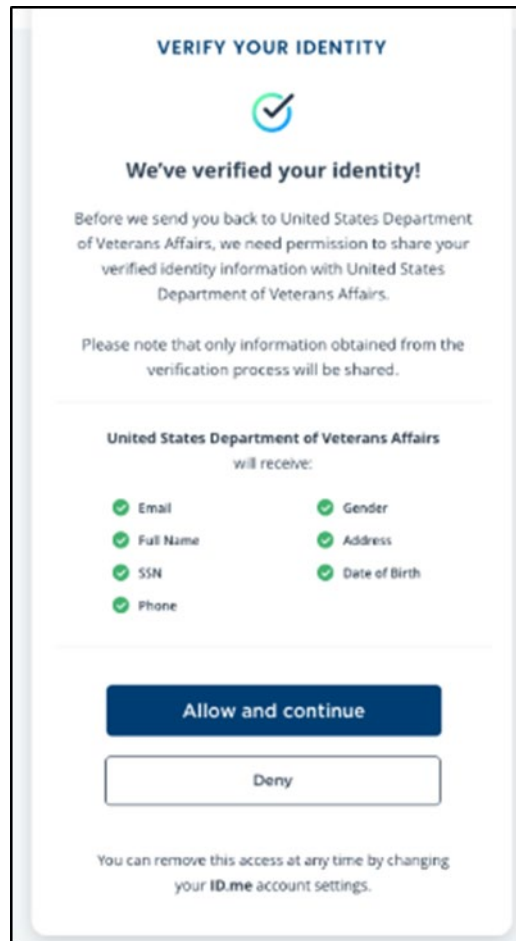
[Close](#)

Back Continue



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

8. Your information will be submitted for verification. If approved, you'll see a page that lists the information being requested from VA.gov and will ask you to consent to the release of that information. Once you click allow you will be taken to the next registration phase below.



To proceed to the second self-registration phase please click [here](#)

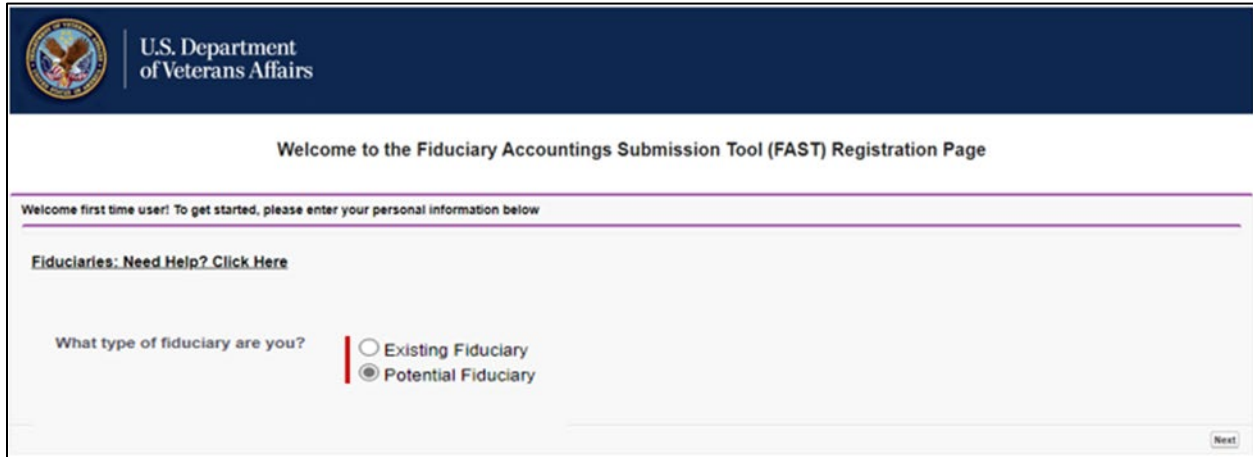


# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

## Phase two self-registration

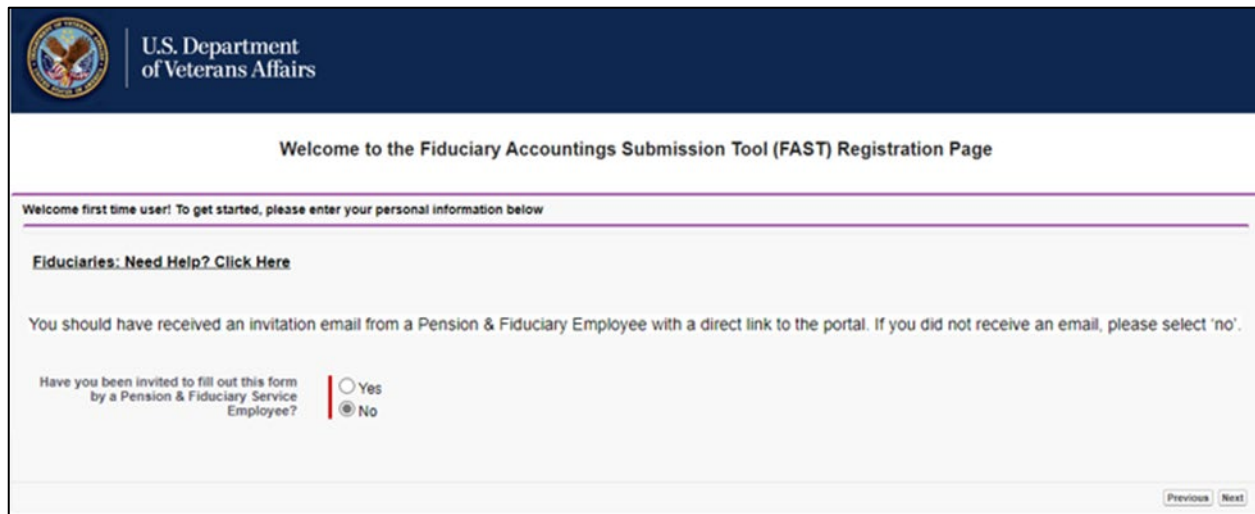
Once you complete the first part process of self-registering, you will then be taken to the second part of the self-registration process which will allow you as a potential Fiduciary to submit your application.

1. Click the option **Potential Fiduciary**, then select **Next**



The screenshot shows the U.S. Department of Veterans Affairs logo and the title 'Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page'. Below the title, it says 'Welcome first time user! To get started, please enter your personal information below'. There is a link for 'Fiduciaries: Need Help? Click Here'. The main question is 'What type of fiduciary are you?' with two radio button options: 'Existing Fiduciary' and 'Potential Fiduciary'. The 'Potential Fiduciary' option is selected. A 'Next' button is visible at the bottom right.

2. You will be asked “**Have you been invited to fill out this form by a Pension & Fiduciary Service Employee?**”.
  - If “**yes**” click [here](#), if “**no**” please proceed below:

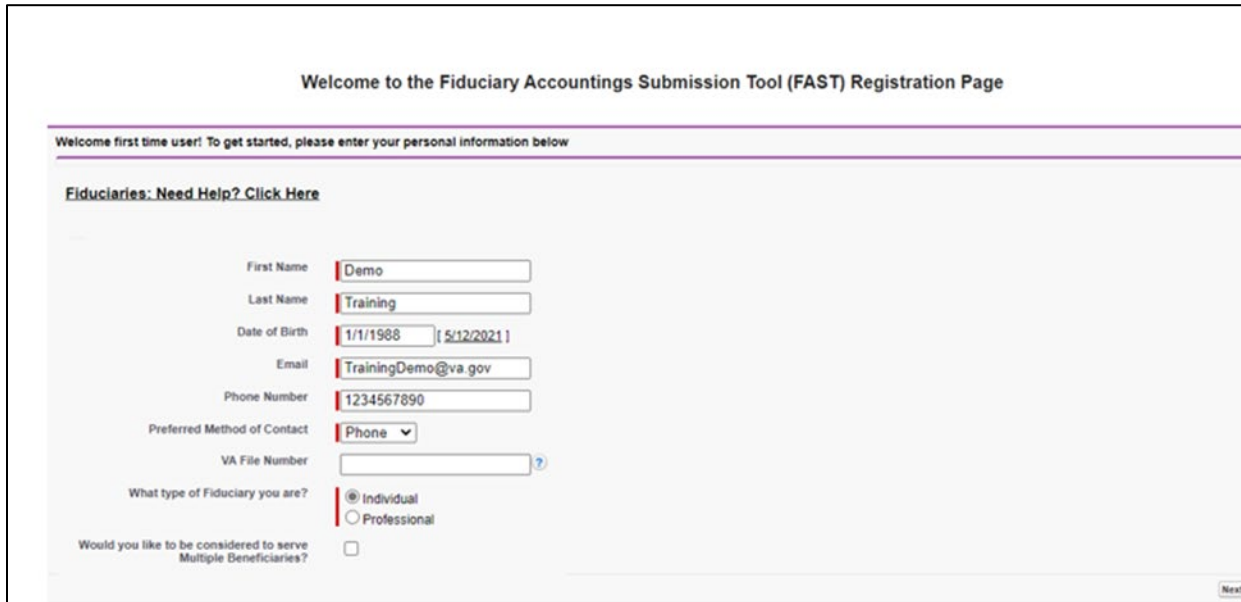


The screenshot shows the U.S. Department of Veterans Affairs logo and the title 'Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page'. Below the title, it says 'Welcome first time user! To get started, please enter your personal information below'. There is a link for 'Fiduciaries: Need Help? Click Here'. The main question is 'Have you been invited to fill out this form by a Pension & Fiduciary Service Employee?' with two radio button options: 'Yes' and 'No'. The 'No' option is selected. A 'Previous' and 'Next' button are visible at the bottom right.



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

3. Fill out the **Fiduciary fields** with your information. Select which type of fiduciary you are:
  - i. **Professional** click [here](#) , **Individual** proceed below:



Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page

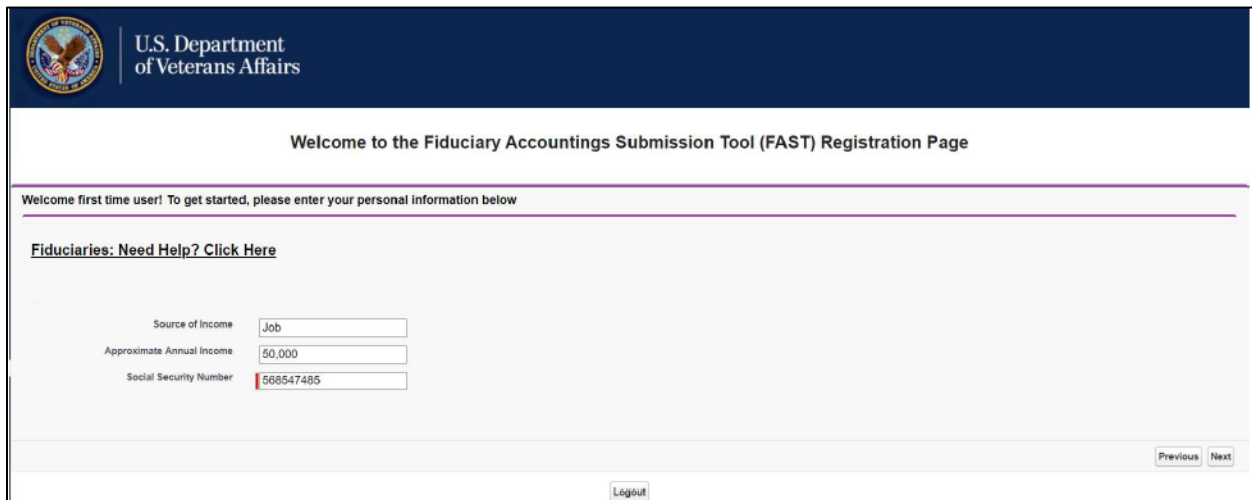
Welcome first time user! To get started, please enter your personal information below

**Fiduciaries: Need Help? Click Here**

First Name: Demo  
Last Name: Training  
Date of Birth: 1/1/1988 [ 5/12/2021 ]  
Email: TrainingDemo@va.gov  
Phone Number: 1234567890  
Preferred Method of Contact: Phone  
VA File Number: [ ? ]  
What type of Fiduciary you are?  
 Individual  
 Professional  
Would you like to be considered to serve Multiple Beneficiaries?

Next

4. Input your **Source of Income**, **Approximate Annual Income**, and **SSN**, then click **Next**.



U.S. Department of Veterans Affairs

Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page

Welcome first time user! To get started, please enter your personal information below

**Fiduciaries: Need Help? Click Here**

Source of Income: Job  
Approximate Annual Income: 50,000  
Social Security Number: 568547485

Previous Next

Logout



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

5. Fill out the **Address** fields, then click **Next**.

Welcome first time user! To get started, please enter your personal information below

[Fiduciaries: Need Help? Click Here](#)

**Physical Address**

Street Name: 1819 N Main Ave  
City: Austin  
Zip Code: 78212  
State: Vermont

**Mailing Street**

Street Name: 1819 N Main Ave  
City: Austin  
Zip Code: 78212  
State: Utah

Previous Next

Logout

6. Fill out the **Veteran** and **Beneficiary** fields. Then click **Next**.

Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page

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[Fiduciaries: Need Help? Click Here](#)

Please enter the First Name of the applicable Veteran. Jasmin  
Please enter the Middle Name of the applicable Veteran (optional).  
Please enter the Last Name of the applicable Veteran. Jimenes  
Please enter the First Name of the applicable Beneficiary. Jasmin  
Please enter the Middle Name of the applicable Beneficiary.  
Please enter the Last Name of the applicable Beneficiary. Jimenes

Relationship to Beneficiary  
 Spouse  
 FamilyMember  
 NonFamilyMember  
 Caregiver  
 Other

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Logout



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

7. Read the **Responsibilities to the Beneficiary** statements. If agreed mark the 'I Agree' checkbox and click Next.

**RESPONSIBILITIES TO THE BENEFICIARY**

- I WILL USE THE BENEFICIARY'S VA BENEFITS UNDER MY MANAGEMENT FOR THE CARE, SUPPORT, EDUCATION, HEALTH, WELFARE, DESIRES AND COMFORT OF THE BENEFICIARY AND HIS OR HER DEPENDENTS
- I WILL ENSURE THAT ANY BEST-INTEREST DETERMINATION REGARDING THE USE OF VA FUNDS IS CONSISTENT WITH VA POLICY, WHICH RECOGNIZES THAT BENEFICIARIES IN THE FIDUCIARY PROGRAM ARE ENTITLED TO THE SAME STANDARD OF LIVING AS ANY OTHER BENEFICIARY WITH THE SAME OR SIMILAR FINANCIAL RESOURCES.
- I ACKNOWLEDGE THAT THE FIDUCIARY PROGRAM IS NOT INTENDED FOR THE PURPOSE OF PRESERVING FUNDS FOR THE BENEFICIARY'S HEIRS. I UNDERSTAND DISBURSEMENT OF FUNDS IS NOT BASED ON MY OWN BELIEFS, VALUES, PREFERENCES AND INTERESTS.
- I WILL MAINTAIN SEPARATE, PROPERLY TITLED FINANCIAL ACCOUNTS TO PREVENT COMMINGLING OF THE BENEFICIARY'S FUNDS FROM MY OWN FUNDS OR THE FUNDS OF ANOTHER BENEFICIARY UNDER MY MANAGEMENT. (THE BENEFICIARY'S SPOUSE, STATE OR LOCAL GOVERNMENT OR INSTITUTIONS, PUBLIC OR PRIVATE ARE EXEMPT FROM THE REQUIREMENT OF ESTABLISHING A SEPARATE ACCOUNT.)
- I WILL DETERMINE THE BENEFICIARY'S MONTHLY EXPENSES AND AGREE TO MAKE TIMELY PAYMENT OF THESE PROVIDED THE BENEFICIARY HAS SUFFICIENT FUNDS TO MEET THE EXPENSES.
- I WILL PROTECT THE BENEFICIARY'S VA BENEFITS FROM LOSS OR DIVERSION, TO INCLUDE PROTECTING THE MONEY FROM CREDITORS. I WILL PRIORITIZE THE BENEFICIARY'S EXPENSES TO ENSURE THE MOST CRITICAL EXPENSES ARE MET FIRST.
- I WILL MAINTAIN PROPER DOCUMENTATION AND RECEIPTS FOR ALL INCOME AND EXPENSES OF THE BENEFICIARY.
- I WILL NOT GAIN ANY PERSONAL FINANCIAL BENEFIT FROM MANAGEMENT OR USE OF THE BENEFICIARY'S FUNDS, UNLESS VA PRE-APPROVES FEES.
- I WILL TAKE ALL REASONABLE PRECAUTIONS TO PROTECT PAPER AND/OR ELECTRONIC RECORDS IN MY POSSESSION WHICH CONTAIN THE BENEFICIARY'S PERSONALLY IDENTIFIABLE INFORMATION.
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- I UNDERSTAND THAT I WILL BE HELD RESPONSIBLE FOR MISUSE OF THE BENEFICIARY'S FUNDS UNDER MY MANAGEMENT. THIS MAY INCLUDE VA'S ESTABLISHMENT OF A PERSONAL DEBT AGAINST ME AND/OR MY CRIMINAL PROSECUTION.
- I WILL PROVIDE THE BENEFICIARY WITH INFORMATION REGARDING FUNDS UNDER MY MANAGEMENT, INCLUDING A COPY OF APPROVED ANNUAL ACCOUNTINGS.
- I WILL, TO THE EXTENT POSSIBLE AND TO THE BEST OF ABILITIES:
  - ENSURE THE BENEFICIARY RECEIVES APPROPRIATE MEDICAL CARE.
  - CONTACT SOCIAL WORKER OR MENTAL HEALTH PROFESSIONAL REGARDING THE BENEFICIARY, AS NEEDED.
  - ACKNOWLEDGE AND CORRECT ANY DISCORD OR UNCOMFORTABLE LIVING OR OTHER SITUATION
  - REPORT ANY TYPE OF KNOWN OR SUSPECTED ABUSE OF THE BENEFICIARY TO THE APPROPRIATE AUTHORITIES.
  - CONTACT THE BENEFICIARY UPON RECEIVING A FIDUCIARY APPOINTMENT LETTER AND ENSURE THE BENEFICIARY HAS MY UPDATED CONTACT INFORMATION, AT ALL TIMES.
  - MAINTAIN CONTACT WITH THE BENEFICIARY TO ASSESS THE BENEFICIARY'S CAPABILITIES, LIMITATIONS, NEEDS AND OPPORTUNITIES.
- IF A COURT APPOINTED GUARDIAN EXISTS, I WILL PROVIDE COPIES OF ALL FIDUCIARY DOCUMENTATION PROVIDED TO THE BENEFICIARY TO THE COURT APPOINTED GUARDIAN.

I Agree

Previous Next

8. Read the **Responsibilities to the Department of Veterans Affairs** statements, mark the 'I Agree' checkbox and click Next.

**RESPONSIBILITIES TO THE DEPARTMENT OF VETERANS AFFAIRS**

- I ACKNOWLEDGE THAT I MUST MAINTAIN COMPLETE AND ACCURATE RECORDS AND RECEIPTS PERTAINING TO THE USE OF THE BENEFICIARY'S FUNDS. AT THE COMPLETION OF MY SERVICES, I AM OBLIGATED TO MAINTAIN THESE RECORDS AND RECEIPTS FOR TWO YEARS.
- I ACKNOWLEDGE THAT AT THE COMPLETION OF MY SERVICES, I WILL RELEASE ALL BENEFICIARY FUNDS, U.S. SAVINGS BONDS, AND OTHER SECURITIES UNDER MY CONTROL AS A VA FIDUCIARY AS DIRECTED BY VA. IN CASES OF A MINOR CHILD REACHING THE AGE OF MAJORITY, I WILL TURN OVER ANY REMAINING BENEFICIARY FUNDS TO THE BENEFICIARY.
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- I WILL NOTIFY THE FIDUCIARY HUB REGARDING ANY CHANGE IN THE BENEFICIARY'S CIRCUMSTANCES, TO INCLUDE HIS OR HER:
  - RELOCATION, HOSPITALIZATION, OR INCARCERATION.
  - DEATH, SERIOUS ILLNESS, OR ANY OTHER SIGNIFICANT CHANGES IN THE BENEFICIARY'S CIRCUMSTANCES WHICH MIGHT AFFECT THE BENEFICIARY'S WELL-BEING OR BENEFIT PAYMENTS.
- I WILL PROVIDE DOCUMENTATION OR VERIFICATION OF ANY RECORDS CONCERNING THE BENEFICIARY OR MATTERS RELATING TO MY RESPONSIBILITIES AS FIDUCIARY WITHIN 15 DAYS OF A REQUEST FROM VA UNLESS OTHERWISE DIRECTED BY THE HUB MANAGER OR DESIGNEE
- I WILL PARTICIPATE IN FACE-TO-FACE MEETINGS WITH VA STAFF WHEN NECESSARY OR REQUESTED.
- I ACKNOWLEDGE THAT MY PERSONAL INFORMATION AS IT RELATES TO ANY APPEALABLE DECISION, MAY BE RELEASED TO THE BENEFICIARY.
- I ACKNOWLEDGE VA HAS THE AUTHORITY TO COMPLETE A CREDIT BACKGROUND CHECK AND A CRIMINAL HISTORY INQUIRY AS REQUIRED.
- I WILL COMPLY WITH ALL VA POLICIES AND PROCEDURES IDENTIFIED IN 38 C.F.R. PART 13.
- I ACKNOWLEDGE I RECEIVED A COPY OF INFORMATION FOR FIDUCIARIES.
- I AGREE TO READ A GUIDE FOR VA FIDUCIARIES AVAILABLE AT: [HTTP://WWW.BENEFITS.VA.GOV/FIDUCIARY/Fid\\_Guide.pdf](http://www.benefits.va.gov/fiduciary/Fid_Guide.pdf)

I Agree

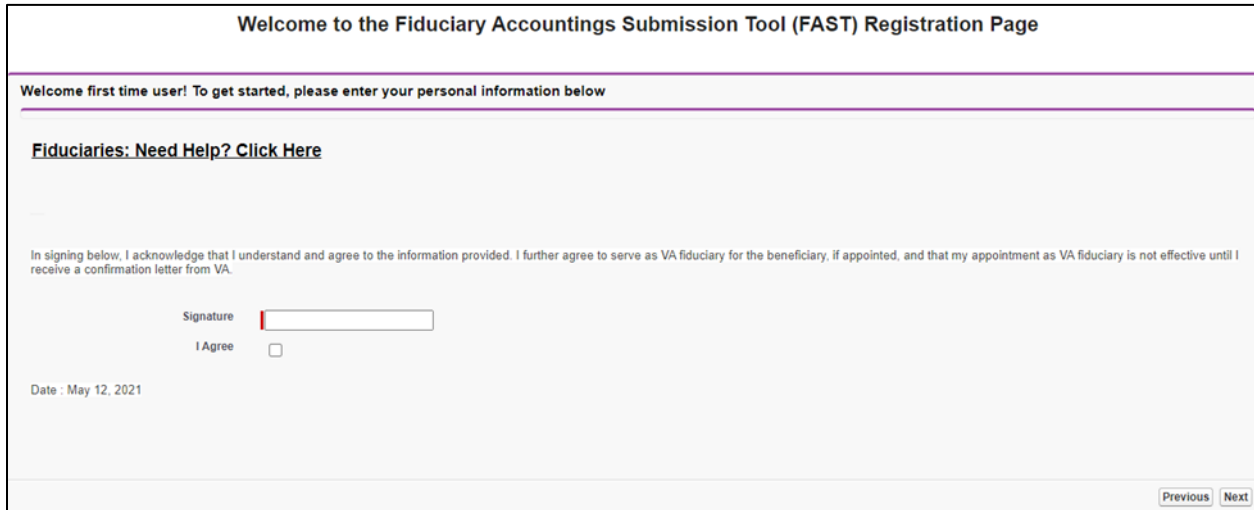
Previous Next





# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

9. Read the **Acknowledgement** statement, input your **signature** and mark the '**I Agree**' checkbox, then click **Next**.



Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page

---

Welcome first time user! To get started, please enter your personal information below

---

**Fiduciaries: Need Help? Click Here**

In signing below, I acknowledge that I understand and agree to the information provided. I further agree to serve as VA fiduciary for the beneficiary, if appointed, and that my appointment as VA fiduciary is not effective until I receive a confirmation letter from VA.

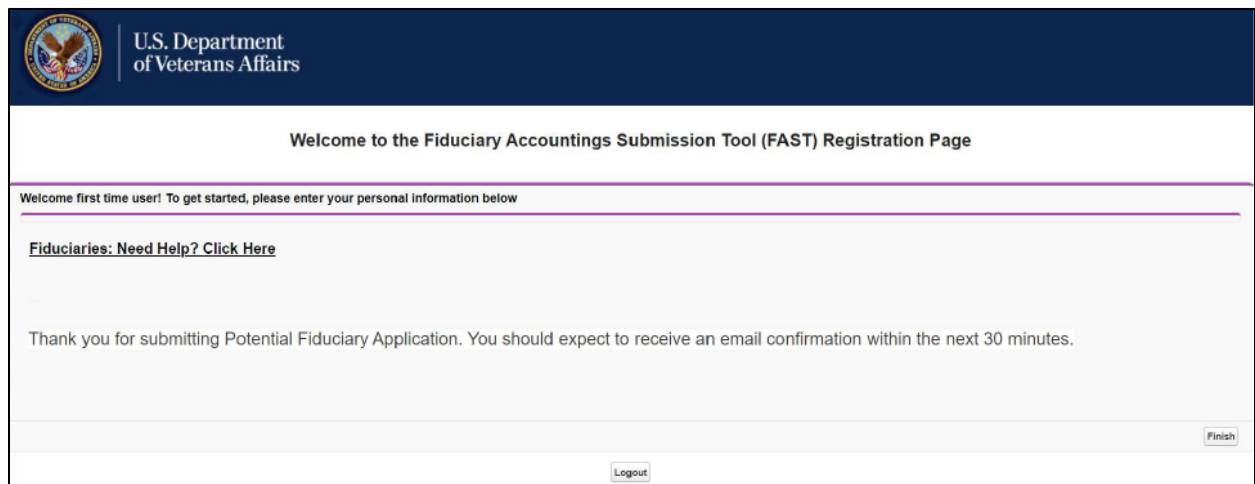
Signature


I Agree

Date : May 12, 2021

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10. Once, you have successfully submitted your **Potential Fiduciary Application**, click **Finish** and then click **logout**.
  - i. You will receive an **email notification** confirming your application **submission**.



 U.S. Department of Veterans Affairs

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Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page

---

Welcome first time user! To get started, please enter your personal information below

---

**Fiduciaries: Need Help? Click Here**

Thank you for submitting Potential Fiduciary Application. You should expect to receive an email confirmation within the next 30 minutes.

[Finish](#)

[Logout](#)

**The Potential Fiduciary Application process is complete!!!!**

[CLICK HERE](#)

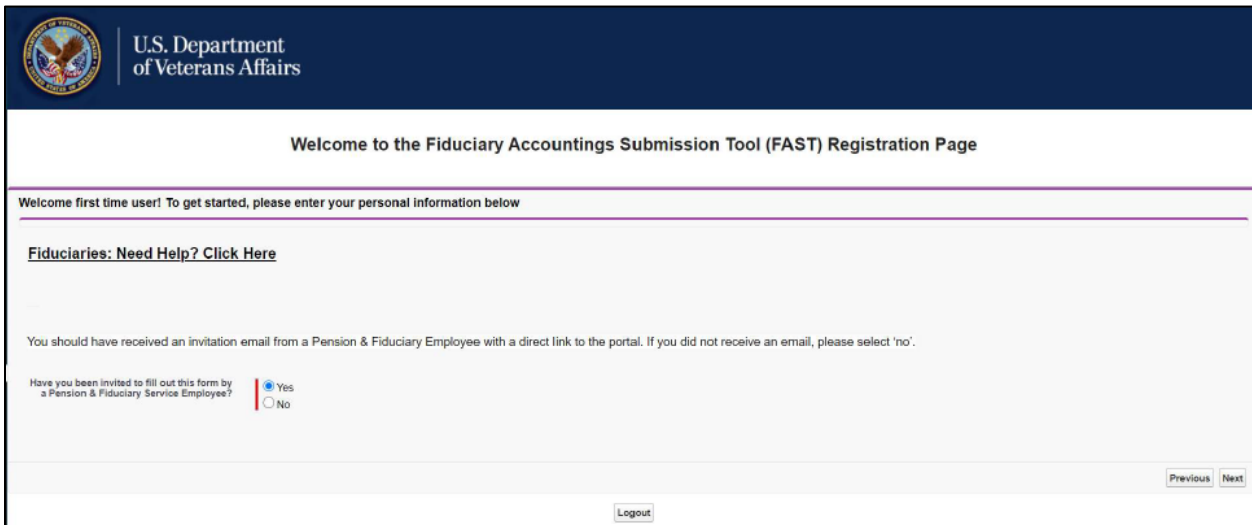


# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

## Invited to be a Potential Fiduciary

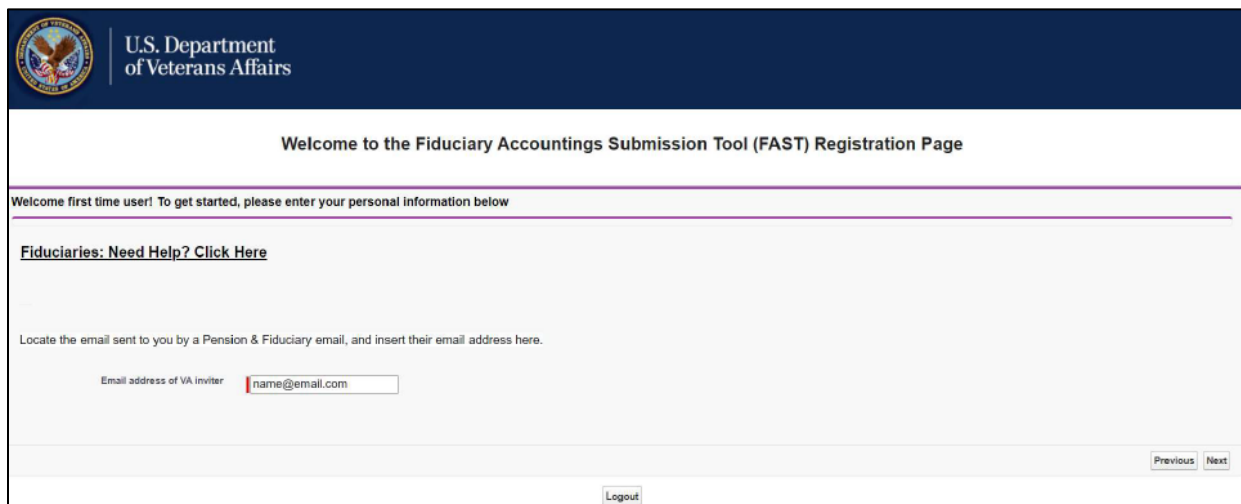
If you've been invited to be a Fiduciary by Pension and Fiduciary Service, please proceed to the steps below:

1. If the scenario is **'Yes you were invited'** then select 'Yes' and click Next



The screenshot shows the U.S. Department of Veterans Affairs logo and the title "U.S. Department of Veterans Affairs". Below the header, it says "Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page". A message reads: "Welcome first time user! To get started, please enter your personal information below". There is a link: "Fiduciaries: Need Help? Click Here". The main instruction is: "You should have received an invitation email from a Pension & Fiduciary Employee with a direct link to the portal. If you did not receive an email, please select 'no'." Below this is a question: "Have you been invited to fill out this form by a Pension & Fiduciary Service Employee?" with radio buttons for "Yes" (selected) and "No". At the bottom right are "Previous" and "Next" buttons, and at the bottom center is a "Logout" button.

2. For **"Email address of VA inviter"** input the email of the P&F employee who invited you and click Next



The screenshot shows the U.S. Department of Veterans Affairs logo and the title "U.S. Department of Veterans Affairs". Below the header, it says "Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page". A message reads: "Welcome first time user! To get started, please enter your personal information below". There is a link: "Fiduciaries: Need Help? Click Here". The main instruction is: "Locate the email sent to you by a Pension & Fiduciary email, and insert their email address here." Below this is a text input field labeled "Email address of VA inviter" with the placeholder text "name@email.com". At the bottom right are "Previous" and "Next" buttons, and at the bottom center is a "Logout" button.



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

3. Fill out the **Fiduciary fields** with your information, then select the **Fiduciary type**:

- **Individual** click [here](#) , **Professional** proceed below:

Welcome first time user! To get started, please enter your personal information below

**Fiduciaries: Need Help? Click Here**

First Name

Last Name

Date of Birth  [ 5/12/2021 ]

Email

Phone Number

Preferred Method of Contact

VA File Number

What type of Fiduciary you are?  
 Individual  
 Professional

Would you like to be considered to serve Multiple Beneficiaries?

Next

4. Please enter the **Firm Name** and **Tax ID**, then click **Next**

Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page

Welcome first time user! To get started, please enter your personal information below

**Fiduciaries: Need Help? Click Here**

Firm Name

Tax Id

Previous Next

Logout



# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

5. Fill out the **Address** fields, then click **Next**

Welcome first time user! To get started, please enter your personal information below

[Fiduciaries: Need Help? Click Here](#)

**Physical Address**

Street Name:

City:

Zip Code:

State:

**Mailing Street**

Street Name:

City:

Zip Code:

State:

[Previous](#) [Next](#)

[Logout](#)

6. Fill out the **Veteran** and **Beneficiary** fields, then click **Next**

Welcome first time user! To get started, please enter your personal information below

[Fiduciaries: Need Help? Click Here](#)

Please enter the First Name of the applicable Veteran.

Please enter the Middle Name of the applicable Veteran (optional).

Please enter the Last Name of the applicable Veteran.

Please enter the First Name of the applicable Beneficiary.

Please enter the Middle Name of the applicable Beneficiary.

Please enter the Last Name of the applicable Beneficiary.

Relationship to Beneficiary

- Spouse
- FamilyMember
- NonFamilyMember
- Caregiver
- Other

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# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

7. Read the **Responsibilities to the Beneficiary** statements. If agreed mark the 'I Agree' checkbox and click Next

**RESPONSIBILITIES TO THE BENEFICIARY**

- I WILL USE THE BENEFICIARY'S VA BENEFITS UNDER MY MANAGEMENT FOR THE CARE, SUPPORT, EDUCATION, HEALTH, WELFARE, DESIRES AND COMFORT OF THE BENEFICIARY AND HIS OR HER DEPENDENTS
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I Agree

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8. Read the **Responsibilities to the Department of Veterans Affairs** statements, mark the 'I Agree' checkbox and click Next

**RESPONSIBILITIES TO THE DEPARTMENT OF VETERANS AFFAIRS**

- I ACKNOWLEDGE THAT I MUST MAINTAIN COMPLETE AND ACCURATE RECORDS AND RECEIPTS PERTAINING TO THE USE OF THE BENEFICIARY'S FUNDS. AT THE COMPLETION OF MY SERVICES, I AM OBLIGATED TO MAINTAIN THESE RECORDS AND RECEIPTS FOR TWO YEARS.
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I Agree

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# Fiduciary Accountings Submission Tool (FAST) Training Job Aid Self-Registration (Potential Fiduciary Application)

9. Read the **Acknowledgement** statement, input your **signature** and mark the '**I Agree**' checkbox, then click Next

Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page

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Welcome first time user! To get started, please enter your personal information below

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**Fiduciaries: Need Help? Click Here**

In signing below, I acknowledge that I understand and agree to the information provided. I further agree to serve as VA fiduciary for the beneficiary, if appointed, and that my appointment as VA fiduciary is not effective until I receive a confirmation letter from VA.


Signature

I Agree

Date : May 12, 2021

[Previous](#) [Next](#)

10. Once, you have successfully submitted your **Potential Fiduciary Application**, click Finish and then click logout.
  - i. You will receive an **email notification** confirming your application **submission**.

 U.S. Department of Veterans Affairs

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[Finish](#)

[Logout](#)



# Fiduciary Accountings Submission Tool (FAST)

## Training Job Aid

### Self-Registration (Potential Fiduciary Application)

#### **ID.me Help Desk**

For ID.me support please contact the members support team available 24 hours, 7-days a week at the below link:

<https://help.id.me/hc/en-us>

#### **Outcome**

The Potential Fiduciary has successfully submitted their electronic Form 21P-4703 VA Fiduciary Agreement to be vetted as a potential fiduciary.

Please note: If you are a FIRM Point of Contact (POC) and are approved, you will gain access to view all applications submitted under your firm. You can sign into FAST by using the same username and password created in ID.me.

