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

**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*
2. Click the FAST button.

3. Click on the ID.me button then click Accept.
4. Click the button **Sign-up for an account**

![Sign-up for an account](image)

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

![Sign-up](image)
6. **Access** the email provided on the previous screen; a link will be sent, and you will need to confirm your email address.

![Confirm Email Address](image)

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.

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

![Secure Account](image)

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 set up multi-factor authentication:

- **Text Message or Phone Call**: Get a 6-digit code sent to your phone by text message or phone call.
- **Push Notification**: Approve sign-ins via Push Notifications sent to the ID.me Authenticator mobile app.
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.

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)
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
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”.

![Image of personal information form]

If you’ve frozen your credit report, we’ll send you a personal identification number (PIN) so you can share your true 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

Date

Year

Back

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

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.
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.*
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.
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.

To proceed to the second self-registration phase please click here.
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
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.

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.
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.”
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.
6. 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.
7. 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.
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
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

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:
3. Fill out the Fiduciary fields with your information. Select which type of fiduciary you are:
   i. Professional click here, Individual proceed below:

4. Input your Source of Income, Approximate Annual Income, and SSN, then click Next.
5. Fill out the **Address** fields, then click **Next**.

6. Fill out the **Veteran** and **Beneficiary** fields. Then click **Next**.
7. Read the **Responsibilities to the Beneficiary** statements. If agreed mark the ‘I Agree’ checkbox and click **Next**.

8. Read the **Responsibilities to the Department of Veterans Affairs** statements, mark the ‘I Agree’ checkbox and click **Next**.
9. Read the Acknowledgement statement, input your signature and mark the ‘I Agree’ checkbox, then click 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.

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

2. For “Email address of VA inviter” input the email of the P&F employee who invited you and click Next
3. Fill out the **Fiduciary fields** with your information, then select the **Fiduciary type**:

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

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

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

![Welcome to the Fiduciary Accountings Submission Tool (FAST) Registration Page](#)
5. Fill out the **Address** fields, then click **Next**

6. Fill out the **Veteran** and **Beneficiary** fields, then click **Next**
7. Read the **Responsibilities to the Beneficiary** statements. If agreed mark the 'I Agree' checkbox and click **Next**

![Responsibilities to the Beneficiary](image)

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](image)
9. Read the **Acknowledgement** statement, input your **signature** and mark the 'I Agree' checkbox, then click **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**.
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.