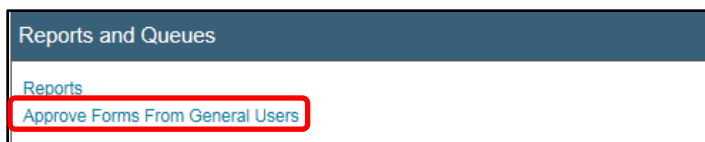
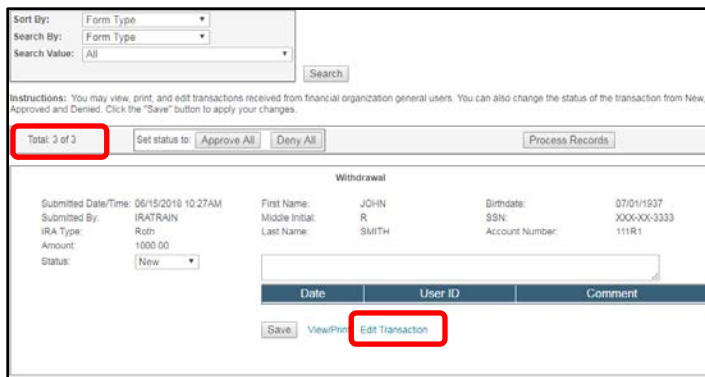


To access the **Approve Forms From General Users** queue, the user clicks the **Approve Forms From General Users** link in the **Reports and Queues** section of the homepage.



The **Approve Forms From General Users** queue is where an Advanced User reviews forms created by General Users, and either approves or denies those forms. The **Total** indicator near the top of the screen displays the number of records awaiting action in the approver queue.



If a form needs correction, an Advanced User has the option to **edit the form** and then save and post the edited document.

The menus at the top of the **Approve Forms From General Users** screen allow the user to perform a customized search. The user can sort and search by form type, Social Security number, account number, signature date, form date, or when the form was submitted.



Advanced Users can also view approved or denied forms from the past 30, 60, 90, or 120 days.

Sort By: Form Type
Search By: History Period
Search Value: 30 Days
Form Type: 60 Days
90 Days
120 Days
Search

Instructions: Click on the status, and edit transactions received from financial org button to apply your changes.

Submitted Date/Time: 05/19/2016 06:28PM
Submitted By: IRATRAN
IRA Type: Traditional
Amount:
Status: **New**
Approved
Denied

Traditional Contribution

First Name: PATRICK Birthdate: 05/20/1964
Middle Initial: J SSN: XXX-XX-3333
Last Name: JACKSON Account Number: 111T1

Date	User ID	Comment
------	---------	---------

Save View/Print Edit Transaction

The status of the forms displayed according to the search selections appears as **New**, **Approved**, or **Denied**.

Normal Disbursal Authorization

Submitted Date/Time: 01/04/2015 08:29AM
Submitted By: IRA SERVICES
IRA Type: Traditional
Status: **New**

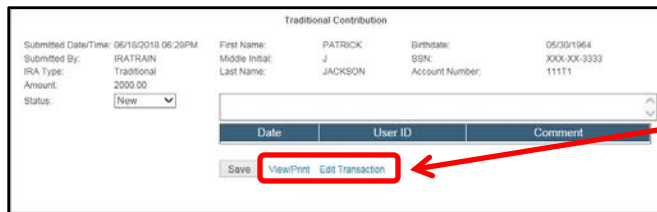
Click on 'Edit Transaction' to complete changes.

First Name: JOSIE Birthdate: 04/27/1949
Middle Initial: A SSN: XXX-XX-4444
Last Name: JOHNSON Account Number: 111T1

Date	User ID	Comment
01/04/2015 08:29AM	FVOLKMAN	Click Edit Transaction to process the disbursal for JOSEPH JOHNSON.

Save Edit Transaction

A **Disbursal Authorization** appears in the approver queue after Ascensus has authorized payments to a beneficiary. Notification that the disbursal authorization is available is sent by fax or mail, according to the financial organization's election for receiving these authorizations.

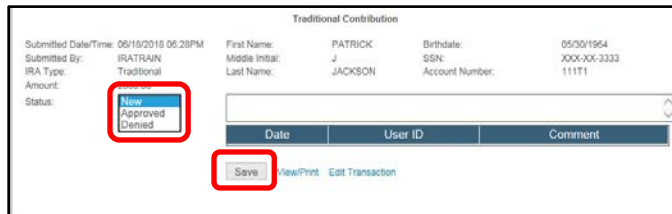


Submitted Date/Time: 05/19/2018 06:26PM
Submitted By: IRATRAN
IRA Type: Traditional
Amount: 2000.00
Status:

First Name: PATRICK
Middle Initial: J
Last Name: JACKSON
Birthdate: 05/20/1964
SSN: XXX-XX-3333
Account Number: 11111

Date	User ID	Comment
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Disbursal Authorizations and new forms created by General Users require the attention of an Advanced User, as they need to be reviewed and then approved or denied. To do that, the user clicks the **View/Print** link, after which the form appears in a new window. For Disbursal Authorizations, or for a form that requires changes, the user clicks the **Edit Transaction** link, makes the necessary changes to the form, and then clicks **Post**.



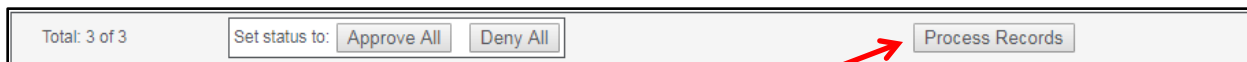
Submitted Date/Time: 05/19/2018 06:28PM
Submitted By: IRATRAN
IRA Type: Traditional
Amount:
Status:

First Name: PATRICK
Middle Initial: J
Last Name: JACKSON
Birthdate: 05/20/1964
SSN: XXX-XX-3333
Account Number: 11111

Date	User ID	Comment
------	---------	---------

To approve or deny a form without reviewing it, the user changes the status of the form from **New** to **Approved** or **Denied**, and then clicks **Save**.

Forms with a **New** status that were changed to **Approved** and then saved, are applied to IRAdirect®.



Total: 3 of 3 Set status to:

The user can also take action for multiple records at once by clicking the applicable button. Clicking **Process Records** allows the user to submit all **approved** records displayed on the screen to IRAdirect.

To enter a status of approved for all records displayed on the screen, the user clicks the **Approve All** button. To enter a status of denied for all records displayed on the screen, the user clicks the **Deny All** button. If a record has been edited, but has not yet been processed, an Advanced User can still deny that record.