

This fictional assistant pilot represents no client work, result or endorsement; its acceptance is separate from the renewal.

The assistant is not accepted.

SEPARATE ASSISTANT PURCHASE

Fielding's quote includes a 'member question assistant.' The bank's required pilot cases are a separate purchase decision.

THE DECISION

Do not buy.

THE REASON

'After-hours wire exception' failed. A later pass used a different instruction and is not a fix. 'Joint owner deceased' was never run. Two of four required cases are unresolved.

THE FILE

The required cases, original instruction, changed instruction, failed attempt, later pass and missing case.

MONDAY ASSIGNMENT

Rerun the wire case using the original instruction, run the missing deceased-owner case and retain both attempts before another acceptance review.

Responsible role: Pilot owner

Reviewer role: Risk reviewer

Owner		Reviewer	
Institution decision		Review date	

This example does not fill those fields.