






Dashboard **Activities** Claims Finance ▾ Reporting ▾

Dashboard > Manage Engagement Activities

Manage Engagement Activities

Create Engagement Activity

Engagement Activities ▾ Lead ▾ Statuses ▾ Physician Society/MSA ▾ Priority ▾ More ▾

ENGAGEMENT ACTIVITIES	PHYSICIAN SOCIETY/MSA	LEAD	STATUS	FUNDS COMMITTED	YTD (ACTUALS)	CUMULATIVE (ACTUALS)	CUMULATIVE ACTUALS %
Pending Approval							
Michelle's Test Activity	Medical Staff Association (Test)	Smith TEST, John	Pending Approval	\$1,000.00	\$0.00	\$0.00	0% 
work life balance	Medical Staff Association (Test)	Black TEST, Richard	Pending Approval	\$3,000.00	\$0.00	\$0.00	0% 
Working Group - Aug Meeting	Medical Staff Association (Test)	Smith TEST, John	Pending Approval	\$100.00	\$0.00	\$0.00	0% 
Active							
Engagement 101	Medical Staff Association (Test)	Brown TEST, Marc	Active	\$1,000.00	\$0.00	\$0.00	0% 
Monthly Working Group Meeting Test	Medical Staff Association (Test)	Black TEST, Richard	Active	\$2,000.00	\$0.00	\$0.00	0% 

The Engagement Activity must be in Active Status

Weekly Meeting - Test

Medical Staff Association (Test)

- Edit Activity
- Create a Sub-activity
- Submit a Claim
- Submit an Expense
- Attach Files
- Hold Activity
- Complete Activity

DETAILS

Status: Active
 Priority: Normal ↑
 Starts: Jul 24, 2018

Click here to Create a Sub-Activity

BUDGET TRACKING

Funds Committed \$500.00
 Cumulative Actuals 0%
 \$0.00
 Funds Remaining 100%
 \$500.00

OBJECTIVES OF ENGAGEMENT ACTIVITY

- Objectives of Engagement Activity
- 15 min report out / sharing by projects (high level status / plans)
- 20 min discussion on test project collaboration topic/s
- 20 min – share new test projects or other test topics

DESCRIPTION OF ENGAGEMENT ACTIVITY

This weekly meeting is for topics common across projects focused on testing (this is a good place to start if you want to get high-level status of the individual projects and learn about hot topics related to Group Testing)

Sub-Activities | Participants | Claims | Files | Business Events

Create a Sub-activity

Sub-Activity Names ▾ Types ▾

NAME	TYPE	STATUS	FUNDS COMMITTED	CUMULATIVE ACTUALS	BURNDOWN
Research for weekly meeting	Research	Active	\$50.00	\$0.00	0%

Create a Sub-Activity

* Activity Type
Meeting

* Name
Feb 9th Planning Mtg

* Description
To plan initiative

* Objectives
Set out guidelines/framework for engagement activity.

* Start Date: 02-09-2017 End Date: mm-dd-yyyy

Submit Cancel

BUDGET	
Budget	\$10,000.00
Budget Used	19%
	\$1,878.58
Remaining	81%
	\$8,121.42

Click on **Submit**

The **Sub-Activity** does NOT need any approval and will be in **Active Status**

Dashboard

Activities

Claims

The Sub-Activity is in Active Status

Dashboard > Manage Engagement Activities > Psychiatric Wait Times > Feb 9th Planning Mtg

[← Back to Engagement Activity](#)

Weekly Meeting - Test

Edit Sub-Activity

Submit a Claim ▾

Attach Files

Hold Sub-Activity

Complete Sub-Activity

DETAILS

Status Active Facilities Bayside High
Sub-Activity Type Meeting
Starts Feb 09, 2017

BUDGET TRACKING

Budget \$0.00
Budget Used 0%
\$0.00
Remaining 0%
\$0.00

Dashboard > Manage Engagement Activities > Activity Detail > Feb 9th Planning Mtg > Sub-Activity Admin

Sub-Activity Admin

Details

Budget

To add funds to the Sub-Activity, click on Budget

* Facilities

Bayside High ✕

* Activity Type

Meeting

* Name

Feb 9th Planning Mtg

* Description

Sub-Activity Admin

Details Budget

Budget:
\$0.00

Edit Budget

1

TYPE	AMOUNT	TOTAL
		No tr

Click on **Edit Budget**

Update Budget

2

Add Amount

* Business Event Type

Add funds to an Activity

* Amount

\$ 4500

* Start Date

02-09-2017

Comments

Submit

Cancel

3

Click **Submit**

Weekly Meeting - Test

Medical Staff Association (Test)

[Edit Activity](#)
[Create a Sub-activity](#)
[Submit a Claim](#)
[Submit an Expense](#)
[Attach Files](#)
[Hold Activity](#)
[Complete Activity](#)

DETAILS

Status: Active
 Priority: Normal ↑
 Starts: Jul 24, 2018
 Facilities: Medical Society Association (Test) Facility
 MoU Category: Working environment for physicians ⓘ

BUDGET TRACKING

Funds Committed: \$500.00
 Cumulative Actuals: 0%
 \$0.00
 Funds Remaining: 100%
 \$500.00

OBJECTIVES OF ENGAGEMENT ACTIVITY

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- 15 min report out / sharing by projects (high level status / plans)
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[Sub-Activities](#)
Participants
[Claims](#)
[Files](#)
[Business Events](#)

[Create a Sub-activity](#)

Sub-Activity Names ▾ Types ▾

NAME	TYPE	STATUS	FUNDS COMMITTED
Research for weekly meeting	Research	Active	\$50.00

Add Participants


The Sub-Activity is listed here

Quick Add Participant

Contact

Contact

Bulk Add

Add Selected  Click on Add Selected

<input checked="" type="checkbox"/>	NAME	PRACTICE/DEPT	USER TYPE	STATUS
<input checked="" type="checkbox"/>	Belding, Mister	Cardiology	Medical Professional	<input type="button" value="Active"/>
<input type="checkbox"/>	Bickerstaffe, Violet		Physician Society Staff	<input type="button" value="Active"/>
<input type="checkbox"/>	Exec, PS	Anesthesia	Medical Professional	<input type="button" value="Active"/>
<input checked="" type="checkbox"/>	Kapowski, Kelly	Obstetrics and Gynecology	Medical Professional	<input type="button" value="Active"/>
<input type="checkbox"/>	Morris, Zack	Occupational Medicine	Medical Professional	<input type="button" value="Active"/>
<input checked="" type="checkbox"/>	Powers, Screech	Plastic Surgery	Medical Professional	<input type="button" value="Active"/>
<input type="checkbox"/>	Slater, AC		Medical Professional	<input type="button" value="Active"/>
<input type="checkbox"/>	Sleep, Jermaine	Anesthesia	Medical Professional	<input type="button" value="Active"/>
<input checked="" type="checkbox"/>	Spano, Jessie		Medical Professional	<input type="button" value="Active"/>
<input type="checkbox"/>	Turtle, Lisa		Physician Society Staff	<input type="button" value="Active"/>

This is the Engagement Activity must be in Active Status

Weekly Meeting - Test

Medical Staff Association (Test)

[Edit Activity](#)
[Create a Sub-activity](#)
[Submit a Claim](#)
[Submit an Expense](#)
[Attach Files](#)
[Hold Activity](#)
[Complete Activity](#)

DETAILS

Status: Active
 Priority: Normal ↑
 Starts: Jul 24, 2018
 Facilities: Medical Society Association (Test) Facility
 MoU Category: Working environment for physicians ⓘ

BUDGET TRACKING

Funds Committed: \$500.00
 Cumulative Actuals: 0%
 \$0.00
 Funds Remaining: 100%
 \$500.00

OBJECTIVES OF ENGAGEMENT ACTIVITY

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DESCRIPTION OF ENGAGEMENT ACTIVITY

This weekly meeting is for topics common across projects focused on testing (this is a good place to start if you want to get high-level status of the individual projects and learn about hot topics related to Group Testing)

This is the Sub-Activity just created in Active Status

Sub-Activities | Participants | Claims

[Create a Sub-activity](#)

Sub-Activity Names ▾ Types ▾

NAME	TYPE	STATUS	FUNDS COMMITTED	CUMULATIVE ACTUALS	BURNDOWN
Research for weekly meeting	Research	Active	\$50.00	\$0.00	0% <div style="width: 0%; height: 10px; background-color: #ccc;"></div>