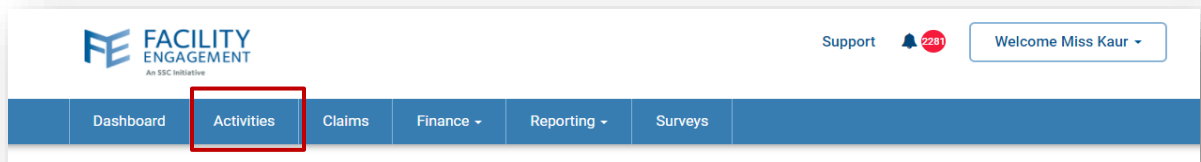


FEMS Tip Sheet:

How to Add and Remove Budget from Engagement Activities

How to solve it in FEMS

1. Click on the Activities tab on the main dashboard.



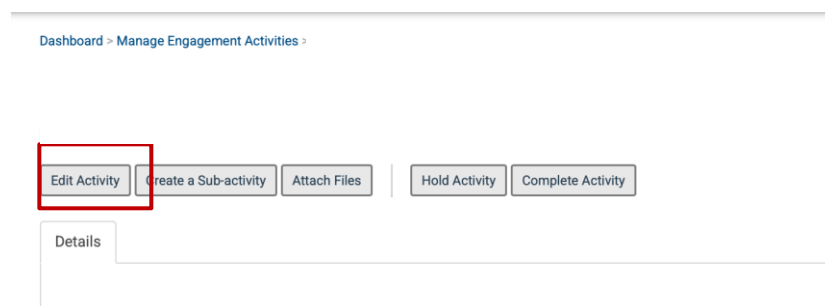
2. Select the active engagement activity that you wish to adjust the budget for.

Manage Engagement Activities

The screenshot shows the 'Manage Engagement Activities' interface. At the top, there are several filters: 'Engagement Activities', 'Lead', 'Statuses', 'Physician Society/MSA', 'Portfolio', 'Priority', 'SEAT Status', 'SEAT ID', and 'More'. A 'Clear All Filters' button is on the right. Below the filters is a table with the following columns: 'ENGAGEMENT ACTIVITIES', 'PHYSICIAN SOCIETY/MSA', 'PORTFOLIO', 'LEAD', 'STATUS', 'FUNDS COMMITTED', 'YTD (ACTUALS)', 'CUMULATIVE (ACTUALS)', and 'CUMULATIVE ACTUALS %'. The first row of the table is highlighted in blue and contains the word 'Active'. A red arrow points from the text 'Select the active engagement activity' to this row.

ENGAGEMENT ACTIVITIES	PHYSICIAN SOCIETY/MSA	PORTFOLIO	LEAD	STATUS	FUNDS COMMITTED	YTD (ACTUALS)	CUMULATIVE (ACTUALS)	CUMULATIVE ACTUALS %
Active								

3. Click the Edit Activity button



FEMS Tip Sheet:

How to Add and Remove Budget from Engagement Activities

- Click the Budget Tab.

Engagement Activities Admin

Details

Budget

Roles

* Physician Society/MSA

* Facilities

IRE Facility x

Is this activity DoBC managed?

☐ No

- Click the Edit Budget button.

Engagement Activities Admin

[← Back to Engagement Activity](#)

Details

Budget

Roles

Funds Committed:
\$12,477.01

Edit Budget

TYPE	AMOUNT	TOTAL	BY	DATE	COMMENTS
Additional	\$12,477.01	\$12,477.01	Facility, Engagement	04/05/2024	2024-25 remaining budget

Showing 1 to 1 of 1 entries | Show 15 entries

[« Previous](#) [1](#) [Next »](#)

FEMS Tip Sheet:

How to Add and Remove Budget from Engagement Activities

6. Select which option you would like to use.
- If you wish to add budget to the activity, choose commit funds
 - If you wish to remove budget from the activity, choose return funds

Dashboard > Manage Engagement Activities >

Update Authorized Budget Allocation

* Business Event Type

Commit funds to an Engagement Activity

Commit funds to an Engagement Activity

Return funds from an Engagement Activity

Date

03-07-2025

Comments

7. Select the amount of money you wish to add/remove and add in any comments you would like to attach to the transaction.
- NOTE: when removing budget, you do not need to add a minus sign to the dollar amount.

Update Authorized Budget Allocation

* Business Event Type

Commit funds to an Engagement Activity

* Amount

\$ Budget

Date

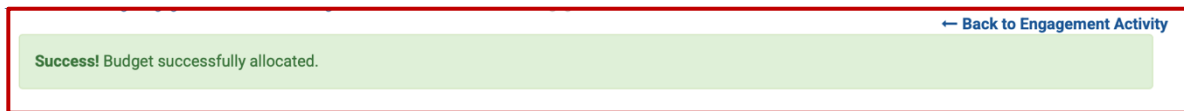
03-07-2025

Comments

FEMS Tip Sheet:

How to Add and Remove Budget from Engagement Activities

8. Press the Submit button. A banner will appear showing success.
- NOTE: if an error appears, follow the instructions on the error and then return to follow steps 1-7.



Engagement Activities Admin

Details Budget Roles

Funds Committed:
\$12,478.01

Edit Budget

TYPE	AMOUNT	TOTAL	BY	DATE	COMMENTS
------	--------	-------	----	------	----------

Show 15 entries

9. The change and any previous changes to the budget will appear on the transaction grid.

Details Budget Roles

Funds Committed:
\$12,478.01

Edit Budget

TYPE	AMOUNT	TOTAL	BY	DATE	COMMENTS
Additional	\$12,477.01	\$12,477.01	Facility, Engagement	04/05/2024	2024-25 remaining budget
Additional	\$1.00	\$12,478.01	Racicot, Sarah	03/07/2025	

Showing 1 to 2 of 2 entries | Show 15 entries

< Previous 1 Next >