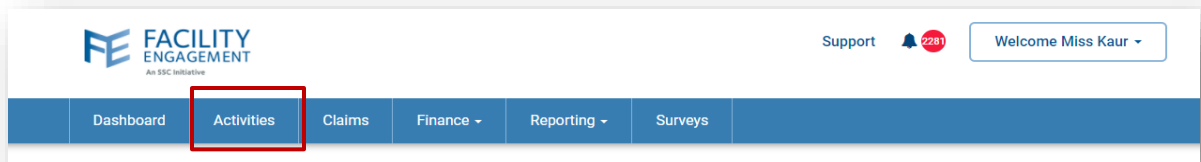


FEMS Tip Sheet:

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.



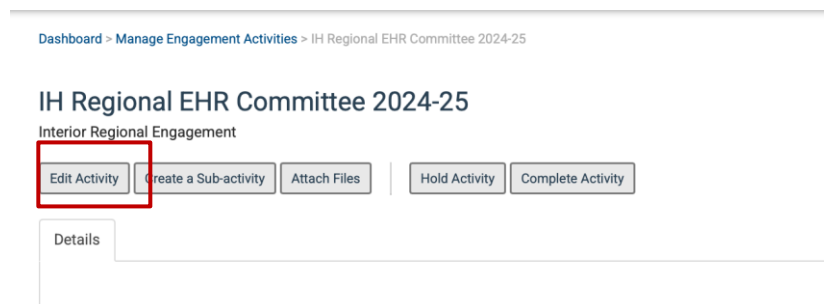
2. Select the active engagement activity that you wish to adjust the budget for.

Manage Engagement Activities

Engagement Activities ▾ Lead ▾ Statuses ▾ Physician Society/MSA ▾ Portfolio ▾ Priority ▾ SEAT Status ▾ SEAT ID ▾ More ▾ Clear All Filters

| ENGAGEMENT ACTIVITIES | PHYSICIAN SOCIETY/MSA | PORTFOLIO | LEAD | STATUS | FUNDS COMMITTED | YTD (ACTUALS) | CUMULATIVE (ACTUALS) | CUMULATIVE ACTUALS % |
|---------------------------------------------|------------------------------|-----------|-----------------------|--------|-----------------|---------------|----------------------|----------------------|
| Active | | | | | | | | |
| Civility Matters Regional Tour | Interior Regional Engagement | FE | Hughes-Geekie, Sharon | Active | \$35,378.90 | \$33,758.37 | \$33,758.37 | 95% |
| EK Patient Transportation Committee 2024-25 | Interior Regional Engagement | FE | Facility, Engagement | Active | \$15,000.00 | \$1,422.65 | \$1,422.65 | 9% |
| IH Regional EHR Committee 2024-25 | Interior Regional Engagement | FE | Facility, Engagement | Active | \$12,477.01 | \$2,774.84 | \$2,774.84 | 22% |
| IHA Hospitalist Community of | Interior Regional Engagement | FE | Mattei, Mona | Active | \$20,000.00 | \$6,615.01 | \$6,615.01 | 33% |

3. Click the Edit Activity button



FEMS Tip Sheet:

How to Add and Remove Budget from Engagement Activities

4. Click the Budget Tab.

Engagement Activities Admin

Details **Budget** Roles

* Physician Society/MSA

Interior Regional Engagement ▼

* Facilities

IRE Facility x ▼

Is this activity DoBC managed?

☐ No

5. 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 > IH Regional EHR Committee 2024-25 > Engagement Activities Admin > Update Budget

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

Submit Cancel

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

Submit Cancel

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.

[← Back to Engagement Activity](#)
Success! Budget successfully allocated.

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 »