

FEMS Tip Sheet:

How Executives Approve Supplier Claims and Profiles

How to approve them in FEMS

1. Click on the approvals tab in FEMS, this will open all claims and profiles for your MSA.
 - a. MSA executives will see all claims, activities, and suppliers that require approval within one main dashboard. **NOTE: NEW supplier profiles must be approved by an executive member.**
 - b. Items in Pending Exec Approval are those that require approval by an MSA executive.

Dashboard > Approvals

Approvals

Physician Society/MSA Type Date Status Clear All Filters

PHYSICIAN SOCIETY/MSA	DATE	TYPE	NAME	DESCRIPTION	STATUS
	04/08/2024	Supplier		Supplier: Contact: 	Pending Exec Approval

2. Credit card claims are eligible for the bulk approval process for MSA executives.
 - a. Click the Claim Tab, filter the More option to Bulk Approvals, and then the Bulk Approvals option.
 - b. Receipts will be on the right and the click all or individual on the left.

Dashboard Approvals Activities Claims Portfolios Finance Reporting

Dashboard > Claims

Claims

Submit a Claim Submit an Expense Submit Supplier Expense

Claim Number Claimant Engagement Activity Physician Society/MSA Submitted Activity Date Status Bulk Approvals More

Clear All Filters

CLAIM NUMBER	CLAIMANT	ENGAGEMENT ACTIVITY	PHYSICIAN SOCIETY/MSA	SUBMITTED	ACTIVITY DATE	DESCRIPTION	TOTAL	STATUS
XPVP8X	TestLast, TestFirst	Honoraria	Bayleaf Test Physician Society	Mar 26, 2024	Mar 26, 2024		\$21.00	Pend
54Y3WX	Test, SupplierHasMSAandCC	Bayleaf Governance	Bayleaf Test Physician Society	Mar 21, 2024	Mar 21, 2024		\$105.00	Pending Review

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3. Things to consider prior to approving a supplier claim:
 - a. Is the receipt attached detailed with vendor information, details of services/goods purchased, dates of each service performed and/or a detailed item list of things purchased?
 - b. Is the receipt from a known vendor or supplier that can be verified easily and completely?
 - c. Does the total amount meet reasonable expectations of costs to the MSA?

The image shows two photographs of receipts. The left receipt is from Canada Post/Postes Canada, dated 2023/05/26, for a shipment to SHOPPERS DRUG MART. The right receipt is from The UPS Store, dated 05-26-2023, for a shipment of 3 X 24 MAILING TUBE and TAPE.

Canada Post/Postes Canada
SHOPPERS DRUG MART #0233
3511 BLANSHARD STREET
VICTORIA, BC V8L 3L0
GST/TPS#121805485

2023/05/26 17:00:03 Kate/Kata
CC68446 W/G 2

G/S \$24.86
XPRESSPOST/XP

Item Weight/Poids de l'article: 0.572 kg
Volumetric Equivalent (VE)/
Equivalent volumétrique (EV): 1.540
Destination: Canada
Postal code - ZIP Code/Code postal -
ZIP: V8E1J3

After cut-off, Add 1 business day
(excluding holidays) to your
delivery.
Heure limite dépassée; ajoutez un
jour ouvrable pour la livraison (à
l'exception des jours fériés).

0068446036633122 \$0.00
G/S
INSUR. PARC XP P/C/COLIS ASSUR XP P/C

Amount covered/Montant de la
couverture: \$100.00

G/S \$0.00
DELIVERY CFIRM./CON DE LIVRAISON

G/S \$5.10
FUEL SURCHARGE/SUPPLEMENT POUR CAR

G/S \$18.00
SHIPPING OVRSZ FEE

SUBTL/SOUS-TOTAL \$47.96
GST/TPS \$2.40
TOTAL \$50.36

MasterCard \$50.36

THE UPS STORE
The UPS Store #116
185 - 911 Yates Street
Victoria, BC V8V 4Y9
250-380-7023

Cashier: Cashier
Invoice: 95076
Date: 05-26-2023 10:54

Product	Qty	Price	Disc	Total
3 X 24 MAILING TUBE	2	3.99	0.0%	7.98
TAPE	1	5.00	0.0%	5.00
Sub Total				12.98
GST				0.65
British Columbia PST				0.91
Total				14.54
Master Card				14.54

GST/HST # 80743 6605 RT0001
PST/GST 1001-4907

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4. If a claim is not approved, please click on the individual claim on the dashboard. From here, there are 4 choices.
- Request Further Information** will open a dialogue box to put in a comment to the claimant if there are questions that need to be answered prior to approval.
 - Decline** is used if the claim is not valid and should not be paid – a dialogue box will open to put in a comment to explain why it was declined.
 - Adjust** can be used to correct some common misinformation, like the date or time or activity.
 - Add Comment** opens a dialogue box to add an optional comment to the claim.
 - If, after reviewing the individual claim, you wish to approve the claim, you can choose the **Review Complete – Approve** choice.

Claim #X8DDK3 Pending Review

[← Back to Claims](#)

[Request Further Info](#) | [Decline](#) [Adjust](#) [Add Comment](#) [Review Complete - Approve](#)

5. Below is a diagram of how claims flow into different workflows for approval. Most supplier claims can be approved by the MSA's administrator, with a small amount flowing to the MSA executives.

