

FEMS Tip Sheet:

How to Approve Supplier Claims - Executive

How to solve it in FEMS

1. Click on the claims tab in FEMS, this will open all claims for your MSA.
 - a. Claims in "Pending Exec Approval" are those that require approval by an MSA executive.
 - b. MSA executives will see all claims that require approval within one main dashboard.
 - c. From here, the MSA executive can select which claims to approve with a tick on the left side of the dashboard.
 - d. Relevant receipts for each claim are viewable on the right side of the dashboard.

Dashboard > Claims

Claims

Submit a Claim Submit an Expense Submit Supplier Expense

Claim Number Claimant Engagement Activity Physician Society/MSA Submitted Activity Date Status More Clear All Filters

CLAIM NUMBER	CLAIMANT	ENGAGEMENT ACTIVITY	PHYSICIAN SOCIETY/MSA	SUBMITTED	ACTIVITY DATE	TIME	EXPENSES	TOTAL	STATUS
XPVLVX	Test, SupplierHasMSAandCC	Bayleaf Governance	Bayleaf Test Physician Society	Feb 13, 2024	Feb 01, 2024	\$0.00	\$2.00	\$2.00	Pending Exec Approval

Showing 1 to 1 of 1 entries (filtered from 665 total entries) | Show 15 entries | < Previous 1 Next >

Test Environment

Resources Support 97 Welcome

Dashboard > Finance > Payment Requests

Claims Review

Approve all selected claims

Select all / Unselect all toggle

Exec will review list of claims, select which claims to approve, and then click "Approve all selected claims" button

Not selected

Request	Request Created	Payment Date	Ref. #	Claimants	Physician Society/MSA	Claim #	MoP	Status	More	Clear
<input checked="" type="checkbox"/>	XP7KV5	06/26/2023			Sleep, Jermaine	ARHCC Test Physician Engagement Society	XP7KV5	\$150.02	Receipt	
<input checked="" type="checkbox"/>	XMVMR5	06/19/2023	06/20/2023	1008592	Turk, Christopher	TS Hospital	XMVMR5	\$81.51	Receipt	
<input checked="" type="checkbox"/>	5YQV65	02/14/2023			Tancredi, Sara	Bayleaf Test MSA	5YQV65	\$148.31	Receipt	
<input type="checkbox"/>	X8ZYJX	12/21/2022			Cox, Perry	TS Hospital	X8ZYJX	\$145.80	Image 4 transfer	

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2. Things to consider prior to approving a supplier claim:

- 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?
- Is the receipt from a known vendor or supplier that can be verified easily and completely?
- Does the total amount meet reasonable expectations of costs to the MSA?

Canada Post/Postes Canada
SHOPPERS DRUG MART #0233
3511 BLANSHARD STREET
VICTORIA, BC V8Z 3L0
GST/TPS#121805485

2023/05/26 17:00:03 Kate/Kate
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).

0068446036833122

G/S \$0.00
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

For receipt terms and conditions consult:

ups 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 MAILINGTUBE	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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3. If a claim is not approved, please click on the individual claim on the dashboard. From here, there are 4 choices.
- a. **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.
 - b. **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.
 - c. **Adjust** can be used to correct some common misinformation, like the date or time or activity.
 - d. **Add Comment** opens a dialogue box to add an optional comment to the claim.
 - e. If, after reviewing the individual claim, you wish to approve the claim after all, 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

4. 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.

