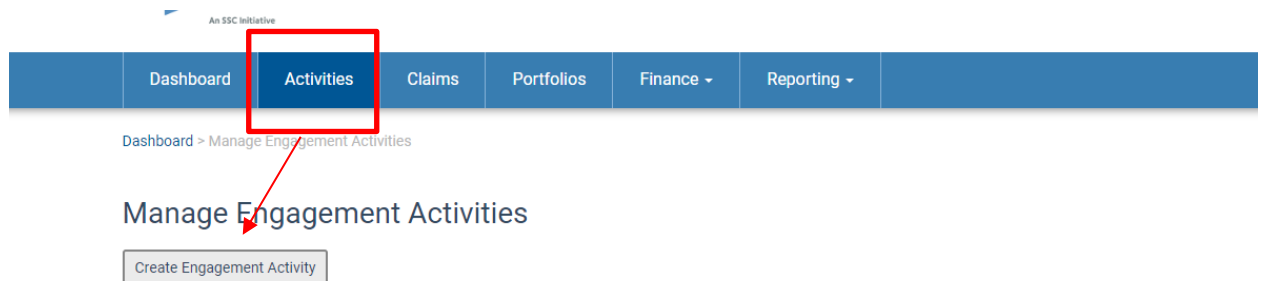


FEMS Tip Sheet:

How to Create an Engagement Activity

How to create it in FEMS

1. Click on the activities tab on the FEMS dashboard and then on Create an Engagement Activity button.



2. Fill out the required fields and select the Next button.

NOTE: The governance option is only for physician societies and for those activities that require the directors to work in their capacity as an MSA executive.

NOTE: The portfolio option will default to Facility Engagement. If you are creating an activity for EHR, or non-FE funding streams, please choose the appropriate portfolio option. For more details, please see the portfolio FAQ [here](#).

F.E. Services Inc.

* Facilities

Is this activity governance based?

☐ No

Include this activity in SEAT?

☐ No

Share activities with other MSAs in our SEAT database. Choose YES if your activity builds engagement and communication with medical staff colleagues and/or your hospital or health authority, contributes to physician wellness, leadership, redevelopment, training and/or technology, and/or seeks to improve patient quality.

* Name of Engagement Activity

Name

Project No.

Project No.

* Activity Purpose / Summary

* Start Date

03-19-2024

End Date

mm-dd-yyyy

* MOU Category

MOU Category

* Portfolio

Facility Engagement

Next Save Draft Cancel

FEMS Tip Sheet:

How to Create an Engagement Activity

3. Fill out the budget number and select the Next button.

Dashboard > Manage Engagement Activities > Test > Engagement Activities Admin > Update Budget

Edit Engagement Activity

Engagement Activity > Budget > Roles

* Commit funds to an Engagement Activity

\$ Budget

Comments

Next > Save Draft < Back Cancel

4. Click the Add button under Lead and select who will be the lead of the activity. If you do not know, you can choose yourself, as this is a required field. Once done, select the Submit Activity button.

NOTE: you do not need to add participants at this stage if you do not yet have that information.

Dashboard > Manage Engagement Activities > Create Engagement Activity

Create Engagement Activity

Engagement Activity > Budget > Roles

Author Facility, Engagement

Lead

Participant

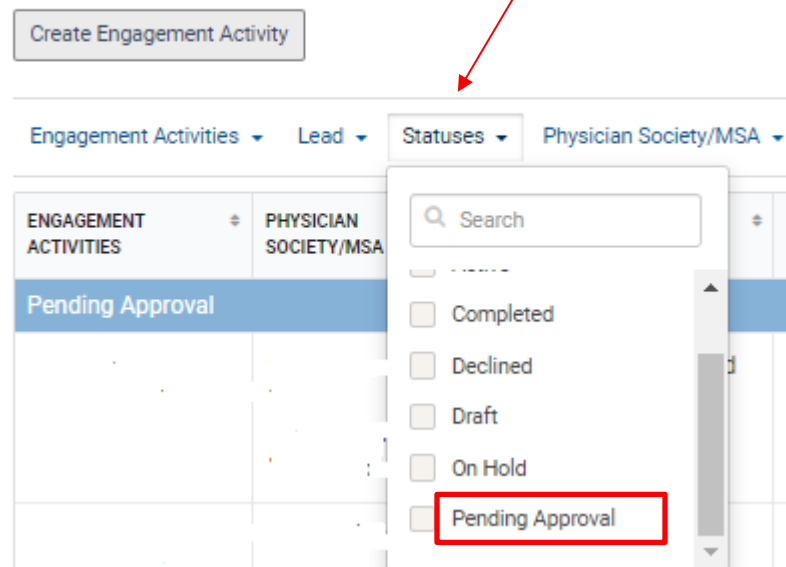
Save Draft Submit Activity < Back Cancel

FEMS Tip Sheet:

How to Create an Engagement Activity

- Once the activity has been submitted, it will need to be approved by an MSA executive or administrator. To check for activities that need approval, please click on the activities tab and then filter the status to pending approval.

Manage Engagement Activities



Create Engagement Activity

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

ENGAGEMENT ACTIVITIES PHYSICIAN SOCIETY/MSA

Pending Approval

Search

☐ Completed

☐ Declined

☐ Draft

☐ On Hold

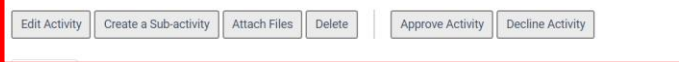
☒ Pending Approval

- Clicking on the activity will open the main page for review, editing, and approval.
NOTE: The activity must be approved before it can be visible for participants to claim against.

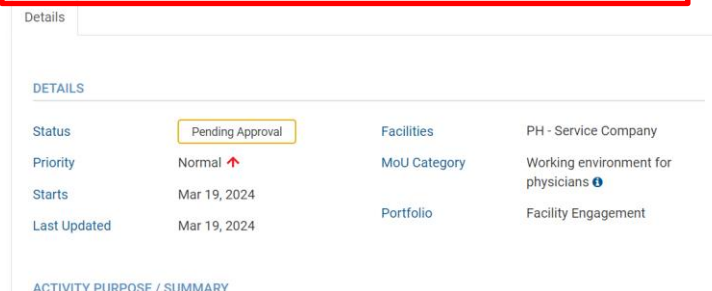
vasn00aro > manage engagement activities > TEST

Test

FE Services Inc.



Edit Activity Create a Sub-activity Attach Files Delete Approve Activity Decline Activity



Details

DETAILS

Status Pending Approval

Priority Normal

Starts Mar 19, 2024

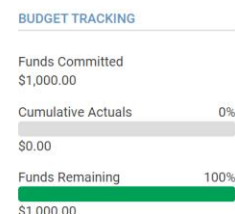
Last Updated Mar 19, 2024

Facilities PH - Service Company

MoU Category Working environment for physicians

Portfolio Facility Engagement

ACTIVITY PURPOSE / SUMMARY



BUDGET TRACKING

Funds Committed \$1,000.00

Cumulative Actuals 0% \$0.00

Funds Remaining 100% \$1,000.00

FEMS Tip Sheet:

How to Create an Engagement Activity

7. Once the activity has been approved, you can add participants, claims, expenses, and sub activities.
- Sub activities are meant to be used in cases where there is work happening within the main activity that is directly related. An example would be having a main activity of Working Group and a sub activity of Working Group – March.
 - Budgets for sub activities come directly from the main activity and vice versa. An example is the main activity has \$10,000 in it, and you add a sub activity with \$12,000, that would not work as it exceeds the amount available in the main activity.
 - Removing budget from a sub activity returns it to the main activity, not the main MSA budget.
 - Participants can be added at anytime to any activity, providing that they are on the MSA's member list (see additional [tip sheet](#) on adding members to the MSA)
 - The activity history tab will show when the activity was created, by whom, and when changes or budgets are added to the activity.
 - **NOTE:** If an activity is declined or put on hold, the budget that has been added to the activity will not be returned to the main budget the same way as a completed activity. You will have to ensure that the budget is reduced or zeroed out in those activities prior to the decline or hold action by using the Edit Activity button (see additional [tip sheet](#) on adjusting budgets in activities).

The screenshot displays the FEMS system interface. At the top, a navigation bar includes tabs for Sub-Activities, Participants, Claims, Files, Business Events, and Activity History. The 'Sub-Activities' tab is active, showing a 'Create a Sub-activity' button. Below this is a table with columns: NAME, TYPE, STATUS, FUNDS COMMITTED, CUMULATIVE ACTUALS, BURNDOWN, and SEAT STATUS. The table is currently empty, displaying 'No activity records found'.

Below the table, the breadcrumb trail reads: 'Dashboard > Manage engagement Activities > TEST'. The main section is titled 'Test' and shows 'FE Services Inc.' as the organization. A row of buttons includes 'Edit Activity', 'Create a Sub-activity', 'Attach Files', 'Delete', 'Approve Activity', and 'Decline Activity'. The 'Edit Activity' button is highlighted with a red box.

The 'Details' section for the 'Test' activity is shown below. It includes a 'DETAILS' tab and a 'BUDGET TRACKING' section. The 'DETAILS' section shows the following information:

Field	Value
Status	Pending Approval
Priority	Normal
Starts	Mar 19, 2024
Last Updated	Mar 19, 2024
Facilities	PH - Service Company
MoU Category	Working environment for physicians
Portfolio	Facility Engagement

The 'BUDGET TRACKING' section shows the following data:

Category	Amount	Percentage
Funds Committed	\$1,000.00	
Cumulative Actuals	\$0.00	0%
Funds Remaining	\$1,000.00	100%