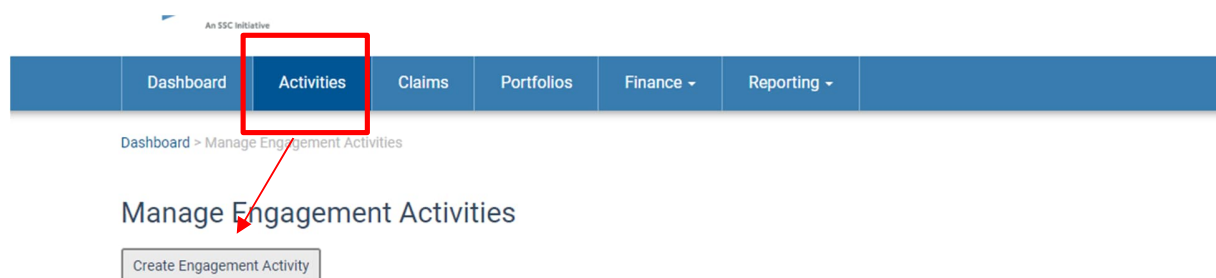


FEMS Tip Sheet:

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 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.

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

Abdulla, Alyn

Aiken, Trevor

Applewhite, Christopher

Armogam, Preianathan

Ashley, Andrew

Bahl, Gaurav

Add

Cancel

Participant

Save Draft

Submit Activity

< Back

Cancel

FEMS Tip Sheet:

How to Create an Engagement Activity

5. 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

6. 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.

Dashboard > 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 Facilities PH - Service Company
Priority Normal ↑ MoU Category Working environment for physicians ⓘ
Starts Mar 19, 2024 Portfolio Facility Engagement
Last Updated Mar 19, 2024

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.
 - 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.

Sub-Activities

Participants

Claims

Files

Business Events

Activity History

Create a Sub-activity

Sub-Activity Names ▾ Types ▾

NAME	TYPE	STATUS	FUNDS COMMITTED	CUMULATIVE ACTUALS	BURNDOWN	SEAT STATUS
No activity records found						

Dashboard > Manage Engagement Activities > TEST

Test

F.E. Services Inc.

Edit Activity

Create a Sub-activity

Attach Files

Delete

Approve Activity

Decline Activity

Details

DETAILS

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

ACTIVITY PURPOSE / SUMMARY

BUDGET TRACKING

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