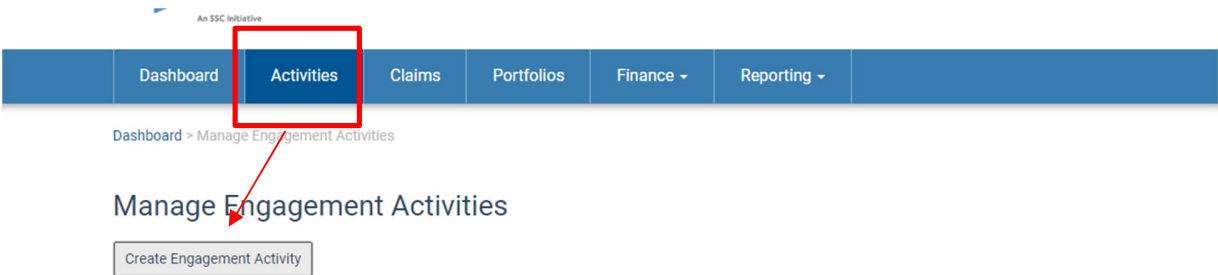


FEMS Tip Sheet: How to Create an Engagement Activity



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.

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



* Commit funds to an Engagement Activity

Comments

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



Author Facility, Engagement

Lead

- Abdulla, Alym
- Aiken, Trevor
- Applewhite, Christopher
- Armogam, Preianathan
- Ashley, Andrew
- Bahl, Gaurav

Participant

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

The screenshot shows the 'Manage Engagement Activities' page. At the top, there is a 'Create Engagement Activity' button. Below it, there are filters for 'Engagement Activities', 'Lead', 'Statuses', and 'Physician Society/MSA'. The 'Statuses' dropdown menu is open, showing a search bar and several status options: 'Completed', 'Declined', 'Draft', 'On Hold', and 'Pending Approval'. The 'Pending Approval' option is selected and highlighted with a red box. A red arrow points to the 'Statuses' dropdown menu.

- 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.

The screenshot shows the details page for an activity named 'Test'. At the top, there is a breadcrumb trail: 'Dashboard > Manage Engagement Activities > Test'. Below the title, there is a red box highlighting a set of action buttons: 'Edit Activity', 'Create a Sub-activity', 'Attach Files', 'Delete', 'Approve Activity', and 'Decline Activity'. The 'Status' is 'Pending Approval'. The 'Details' section shows the following information:

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

On the right side, there is a 'BUDGET TRACKING' section with a progress bar showing 'Funds Committed' at \$1,000.00 (0%) and 'Funds Remaining' at \$1,000.00 (100%).

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.

Dashboard > Manage Engagement Activities > TEST

Test

F.E. Services Inc.

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

