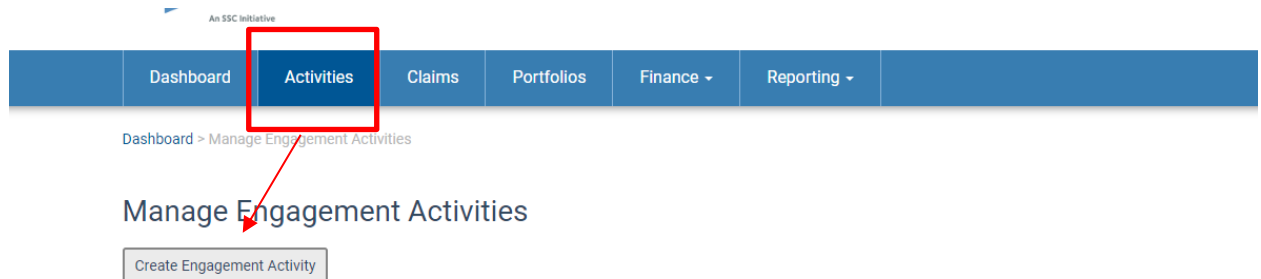


FEMS Tip Sheet:

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.



An SSC Initiative

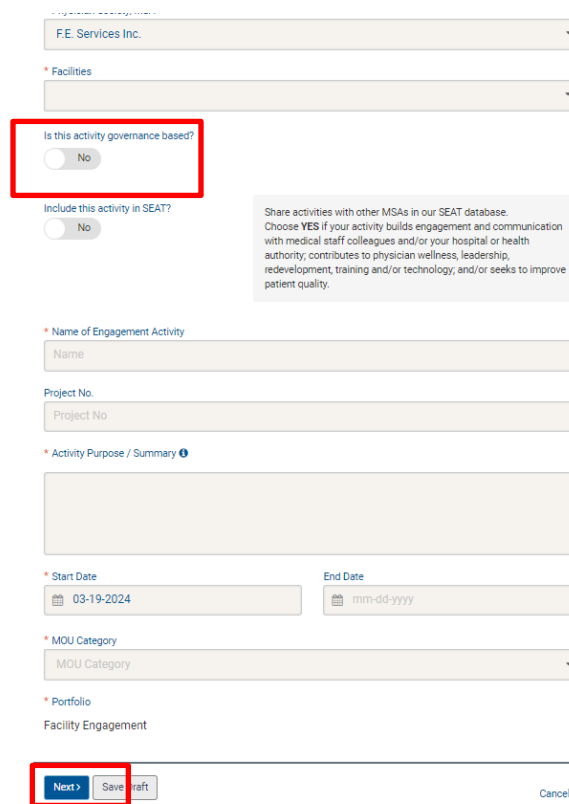
Dashboard Activities Claims Portfolios Finance Reporting

Dashboard > Manage Engagement Activities

Manage Engagement Activities

Create Engagement Activity

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.



Organization
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

Add Cancel

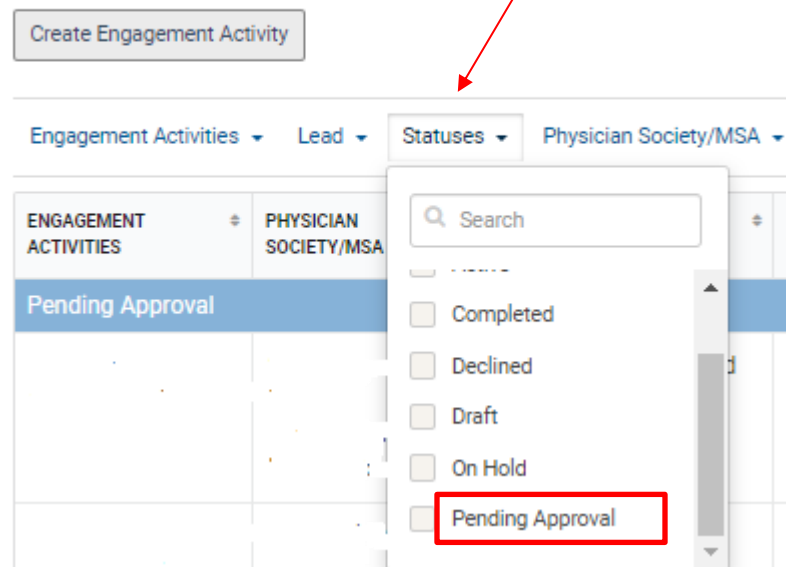
Abdulla, Alyn
Alken, Trevor
Applewhaithe, Christopher
Armogam, Preianathan
Ashley, Andrew
Bahl, Gaurav

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

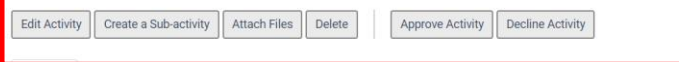
☒ Pending Approval

- 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	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 (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 entity. A row of buttons includes 'Edit Activity' (highlighted with a red box), 'Create a Sub-activity', 'Attach Files', 'Delete', 'Approve Activity', and 'Decline Activity'.

The 'Details' section is expanded, showing 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

To the right of the details is a 'BUDGET TRACKING' section with a progress bar:

BUDGET TRACKING	
Funds Committed	\$1,000.00
Cumulative Actuals	\$0.00
Funds Remaining	\$1,000.00

The progress bar for 'Funds Remaining' is at 100%.