

## FOR A PHYSICIAN SOCIETY FEMS ADMIN

**Step 1:** Please log into the [training environment](https://training.facilityengagement.ca/Account/Login) (<https://training.facilityengagement.ca/Account/Login>) and complete the set of accompanying exercises below following the video recordings and step guides. Credentials for the Training Environment **Username:** [project.manager2@gmail.com](mailto:project.manager2@gmail.com) **Password:** Test123!

SELF-GUIDED COURSES	VIDEO RECORDINGS	STEP GUIDES	SET OF EXERCISES
FEMS Overview FEMS Terminology	<a href="https://youtu.be/au04KC7_W0A">https://youtu.be/au04KC7_W0A</a>	<a href="#">What is FEMS Terminology Guide</a>	
How to register for FEMS How to register for VersaPay How to register for VoPay (alternative method of payment)	<a href="https://youtu.be/OfUoNUdwlik">https://youtu.be/OfUoNUdwlik</a> <a href="https://youtu.be/YGkM7iO7A1Q">https://youtu.be/YGkM7iO7A1Q</a>	<a href="#">Link to Step Guide</a> <a href="#">Link to Step Guide</a> <a href="#">Link to Step Guide</a>	
How to create an Engagement Activity (EA) and submit it into the SEAT database	<a href="https://youtu.be/P9IXSiFLOEY">https://youtu.be/P9IXSiFLOEY</a>	<a href="#">Link to Step Guide</a>	Create an Engagement Activity <ul style="list-style-type: none"> <li>Enter a budget</li> <li>Add Multiple Participants</li> </ul>
How to create a Sub-activity and submit it into the SEAT database	<a href="https://youtu.be/C9YAz0iFG8g">https://youtu.be/C9YAz0iFG8g</a>	<a href="#">Link to Step Guide</a>	Create a Sub activity <ul style="list-style-type: none"> <li>Enter a budget</li> <li>Add Multiple Participants</li> </ul>
How to update SEAT EAs for submission deadlines	<a href="https://youtu.be/dtqm5YGjeI4">https://youtu.be/dtqm5YGjeI4</a>	<a href="#">Link to Step Guide</a>	
How to create an EA for Internal Operating Expenses (IOE)	<a href="https://youtu.be/3i5GrZ-5lwk">https://youtu.be/3i5GrZ-5lwk</a>	<a href="#">Link to Step Guide</a>	Create an IOE EA <ul style="list-style-type: none"> <li>Enter a budget</li> </ul>
Board of Directors & Governance work	<a href="https://youtu.be/AWr5Jc-0WXM">https://youtu.be/AWr5Jc-0WXM</a>	<a href="#">Link to Step Guide</a>	Create an Engagement Activity for Governance work
When to submit a Claim / Expense / Supplier Claim?	<a href="https://youtu.be/vAw2knLKn_8">https://youtu.be/vAw2knLKn_8</a>		
How to submit a Claim	<a href="https://youtu.be/vATKrOI26h0">https://youtu.be/vATKrOI26h0</a>	<a href="#">Link to Step Guide</a>	Submit a Claim on behalf of a physician
How to submit an Expense <ul style="list-style-type: none"> <li>Approve a Pending Claim</li> <li>Adjust a Pending Claim</li> </ul>	<a href="https://youtu.be/v7sUo_Xrjbg">https://youtu.be/v7sUo_Xrjbg</a>	<a href="#">Link to Step Guide</a>	Submit an Expense for a physician <ul style="list-style-type: none"> <li>Approve a Pending Claim</li> <li>Adjust a Pending Claim</li> </ul>
How to submit a Supplier Claim How to submit an expense paid with the Physician Society Credit Card	<a href="https://youtu.be/2eEkjoqPT90">https://youtu.be/2eEkjoqPT90</a> <a href="https://youtu.be/D7kaC9D2ch4">https://youtu.be/D7kaC9D2ch4</a>	<a href="#">Link to Step Guide</a> <a href="#">Link to Step Guide</a>	Submit a Supplier Claim Submit a Credit Card Expense
How to add or return funds to an Engagement Activity	<a href="https://youtu.be/ehhBp6yttuM">https://youtu.be/ehhBp6yttuM</a>		Add funds to an EA
Users Management Notifications	<a href="https://youtu.be/Yz7ftgtwLqc">https://youtu.be/Yz7ftgtwLqc</a> <a href="https://youtu.be/EbCEmJRwzoo">https://youtu.be/EbCEmJRwzoo</a>	<a href="#">Link to Step Guide</a> <a href="#">Link to Step Guide</a>	Reactivate an Expired User
Financial Overview	<a href="https://youtu.be/bZeOeamBCYk">https://youtu.be/bZeOeamBCYk</a>	<a href="#">Link to Step Guide</a>	

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**Step 2:** To register for an account in FEMS, please email [femssupport@doctorsofbc.ca](mailto:femssupport@doctorsofbc.ca) your answers to the questions below:

Question 1: **In order for a physician to submit a claim, a FEMS admin needs to ensure that:**

- a) The physician is added as a "Participant" to the Engagement Activity/Sub Activity
- b) The physician is added as a "Physician Lead" to the Engagement Activity/Sub Activity
- c) The Engagement Activity needs to be in "Active" status
- d) The physician is added as a "Participant" to an "Active" Engagement Activity/Sub Activity

Question 2: **If you paid for an expense with your own credit card, you will need to submit one of the following to get reimbursed:**

- a) An expense as a "Claimant". Your reimbursement will be processed via VersaPay/VoPay
- b) An expense as a "Claimant". Your reimbursement will be processed via Cheque
- c) A supplier claim and the reimbursement will be processed via Cheque
- d) A supplier claim for an expense paid with the Physician Society credit Card

Question 3: **If you paid for an expense with a PS credit card, you will need to submit one of the following in FEMS:**

- a) An expense as a "Claimant". The reimbursement will be processed via VersaPay/VoPay
- b) An expense as a "Claimant". The reimbursement will be processed via Cheque
- c) A supplier claim and the reimbursement will be processed via Cheque
- d) A supplier claim for an expense paid with the Physician Society credit Card

Question 4: **A catering company emailed you an invoice for \$2,500 for lunch served at a working group.**

**What step do you follow in FEMS to you get the invoice paid? You will submit:**

- a) An expense as a "Claimant". The reimbursement will be processed via Cheque
- b) An expense as a "Claimant". The reimbursement will be processed via VersaPay/VoPay
- c) An expense as a "Physician Claimant". The reimbursement will be processed via Cheque
- d) A supplier claim and the reimbursement to the supplier will be processed via Cheque/E-transfer by the PS bookkeeper

Question 5: **What step do you follow to get your monthly consulting invoices paid?**

- a) You will submit an expense as a "Claimant". The reimbursement will be processed via VersaPay/VoPay
- b) You send all of your consulting invoices to the PS bookkeeper for payment
- c) You send all of your consulting invoices to the PS bookkeeper for payment once you ensure that the "Internal Operating Expense" Engagement Activity has enough budget to cover your invoice
- d) You send all your consulting invoices & expenses to the PS bookkeeper

Question 6: **Some "Supplier Claims" show in the dashboard as "Payment Queued": when would they get paid?**

- a) All supplier claims are processed and paid by the PS bookkeeper, therefore you should follow up with him/her on their payment schedule
- b) All supplier claims are processed and paid by VersaPay/VoPay, therefore you should follow up with the VersaPay/VoPay team
- c) All supplier claims are processed and paid by FEMS Support, therefore you should follow up with the FEMS team
- d) None of the above

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## SET OF TASKS IN FEMS

**STEP 3:** Once you have received your login credentials, please log into <https://fems.facilityengagement.ca/Account/Login> to complete the tasks below:

### Task 1:

- Add yourself as a Participant to all Engagement Activities (in order to submit expenses, you need to be added to the EAs as “Participant”)  
→ refer to this video <https://youtu.be/P9IXSiFLOEY> to complete this task

### Task 2:

- Register for VersaPay (all of your expenses must be submitted in FEMS and you will be reimbursed via VersaPay/or VoPay)  
→ refer to this video <https://youtu.be/YGkM7iO7A1Q> to complete this task

### Task 3:

- Add a budget to an Engagement Activity called “Internal Operating Expenses” to cover your salary for the current fiscal year (example: \$40,000 for the current fiscal year from April 1 to March 31). If you do not complete this step, the PS bookkeeper can’t pay for your consulting invoices.
- REMINDER: Don’t include expenses in your consulting invoices (these must be submitted in FEMS).  
→ refer to this video <https://youtu.be/3i5GrZ-5lwk> to complete this task

### Task 4:

- In the “Notifications” section:
  - If there are any claims in “Pending Review”, please review and approve them  
→ refer to this video <https://youtu.be/EbCEmJRwzoo> to complete this task
  - If there are any “New Members”, please add them as participants to the Engagement Activities they are planning to attend  
→ refer to this video <https://youtu.be/EbCEmJRwzoo> to complete this task

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### ADDITIONAL RESOURCES:

[ENTIRE FEMS PRESENTATION](#)

[RESOURCES ON THE FE WEBSITE](#)

[HOW TO BUDGET IN FEMS](#)

### FEMS VIRTUAL TRAINING – Additional VIDEOS

SELF-GUIDED COURSES	STEP GUIDES	VIDEO RECORDINGS
How to create a FEMS account for a physician		<a href="https://youtu.be/Yz7ftqtwLqc">https://youtu.be/Yz7ftqtwLqc</a>
How to update a user's profile: address, email address, method of payment etc.		<a href="https://youtu.be/Yz7ftqtwLqc">https://youtu.be/Yz7ftqtwLqc</a>
Where to check the list of Executives in FEMS and submit any changes to FEMS Support	<a href="#">Link to Step Guide</a>	<a href="https://youtu.be/Yz7ftqtwLqc">https://youtu.be/Yz7ftqtwLqc</a>
How to reset a user's password in FEMS	<a href="#">Link to Step Guide</a>	<a href="https://youtu.be/Yz7ftqtwLqc">https://youtu.be/Yz7ftqtwLqc</a>
How to change banking information (bank account) in VersaPay		<a href="https://youtu.be/YGkM7iO7A1Q">https://youtu.be/YGkM7iO7A1Q</a>
How to add members from other facilities to your Physician Society/MSA		<a href="https://youtu.be/Yz7ftqtwLqc">https://youtu.be/Yz7ftqtwLqc</a>
What to do when a claim is flagged "Information Required"	<a href="#">Link to Step Guide</a>	
Status of claims and when to contact FEMS support or VersaPay	<a href="#">Link to Step Guide</a>	<a href="https://youtu.be/EbCEmJRwzoo">https://youtu.be/EbCEmJRwzoo</a>
Reports available in FEMS	<a href="#">Link to Step Guide</a>	
How to reverse an Approved claim	<a href="#">Link to Step Guide</a>	
Understanding the Financial Overview Carryover	<a href="#">Link to Step Guide</a>	<a href="https://youtu.be/bZeOeamBCYk">https://youtu.be/bZeOeamBCYk</a>