

FOR A PHYSICIAN SOCIETY FEMS ADMIN

Step 1: Please review the video recordings and step guides linked below. Once completed, 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.

Username: project.manager2@gmail.com

Password: Test123!

SELF-GUIDED COURSES	VIDEO RECORDINGS	STEP GUIDES	SET OF EXERCISES
FEMS Overview FEMS Terminology	https://youtu.be/au04KC7_W0A	What is FEMS Terminology Guide	
How to register for FEMS How to register for VersaPay	https://youtu.be/OfUoNUdwlik https://youtu.be/YGkM7iO7A1Q	Link to Step Guide Link to Step Guide	
How to create an Engagement Activity (EA) and submit it into the SEAT database	https://youtu.be/P9IXSiFLOEY	Link to Step Guide	Create an Engagement Activity <ul style="list-style-type: none"> ○ Enter a budget ○ Add Multiple Participants
How to create a Sub-activity and submit it into the SEAT database	https://youtu.be/C9YAz0iFG8g	Link to Step Guide	Create a Sub activity <ul style="list-style-type: none"> ○ Enter a budget ○ Add Multiple Participants
How to update SEAT EAs for submission deadlines	https://youtu.be/dtqm5YGieI4	Link to Step Guide	
How to create an EA for Internal Operating Expenses (IOE)	https://youtu.be/3i5GrZ-5lwk	Link to Step Guide	Create an IOE EA <ul style="list-style-type: none"> ○ Enter a budget
Board of Directors & Governance work	https://youtu.be/AWr5Jc-0WXM	Link to Step Guide	Create an Engagement Activity for Governance work
When to submit a Claim / Expense / Supplier Claim?	https://youtu.be/vAw2knLKn_8		
How to submit a Claim	https://youtu.be/vATKrOI26h0	Link to Step Guide	Submit a Claim on behalf of a physician
How to submit an Expense <ul style="list-style-type: none"> ○ Approve a Pending Claim ○ Adjust a Pending Claim 	https://youtu.be/v7sUo_Xrjbg	Link to Step Guide	Submit an Expense for a physician <ul style="list-style-type: none"> ○ Approve a Pending Claim ○ Adjust a Pending Claim
How to submit a Supplier Claim How to submit an expense paid with the Physician Society Credit Card	https://youtu.be/2eEkjoqPT90 https://youtu.be/D7kaC9D2ch4	Link to Step Guide Link to Step Guide	Submit a Supplier Claim Submit a Credit Card Expense
How to add or return funds to an Engagement Activity	https://youtu.be/ehhBp6yttuM		Add funds to an EA
Users Management Notifications	https://youtu.be/Yz7ftgtwLqc https://youtu.be/EbCEmJRwzoo	Link to Step Guide Link to Step Guide	Reactivate an Expired User

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Step 2: To register for an account in FEMS, please email 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
- 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
- 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
- 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
- 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, therefore you should follow up with the VersaPay 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)
→ 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		https://youtu.be/Yz7ftqtWLgc
How to update a user's profile: address, email address, method of payment etc.		https://youtu.be/Yz7ftqtWLgc
Where to check the list of Executives in FEMS and submit any changes to FEMS Support	Link to Step Guide	https://youtu.be/Yz7ftqtWLgc
How to reset a user's password in FEMS	Link to Step Guide	https://youtu.be/Yz7ftqtWLgc
How to change banking information (bank account) in VersaPay		https://youtu.be/YGkM7iO7A1Q
How to add members from other facilities to your Physician Society/MSA		https://youtu.be/Yz7ftqtWLgc
What to do when a claim is flagged "Information Required"	Link to Step Guide	
Status of claims and when to contact FEMS support or VersaPay	Link to Step Guide	https://youtu.be/EbCEmJRwzoo
Reports available in FEMS	Link to Step Guide	
How to reverse an Approved claim	Link to Step Guide	