# Courtesy Copy: VMS Admin Newsletter: 1st Quarter, 2021

**This is a courtesy copy of an email bulletin sent by Cheryl Foster.**

**This bulletin was sent to the following groups of people:**

Subscribers of Texas Master Naturalist TMN VMS Administrators (227 recipients)

# TMN VMS Support Team Newsletter

## All VMS Meeting Notes

ACK! There was a technical glitch trying to record the meeting... We'll try to summarize the meeting in this newsletter..

## Background Check Process Review

We are really close to having all 5500+ volunteers checked!

- We need a signed waiver and a valid birthdate to run the CBC.  If they can't get to their profile online, we can do it via email.
- If you create the profile for your new class and need to put in a placeholder birthdate - use one with the year of 1900 so that it shows up properly in the grids that we use to run the CBCs  (Although, we recommend that you use an onboarding process that has the trainee put in their own profile through the chapter 'Apply To' opportunity).
- We only run background checks on 'Active' and 'In-Training' volunteers
- The background check process is just a scan of 89 <u>public</u> databases in Texas.  It is not an in-depth review of a volunteer.  If the name & birthdate produce a 'hit', then we send them to TPWD HR where they run it through a different process.  When we send them over we mark the CBC result status as Pending.
- If they pass - and most do - we mark the profile status (first page) as Active and the CBC Result as Passed.
- TPWD CBCs are good for 1 year (free).  AgriLife CBCs are good for 3 years ($10-payable by the chapter).  We do not accept other agency or group background checks (like concealed hand gun licenses or schools)
- We run about 500 background checks a month, usually twice a month, more if there are a lot of classes starting up.
- Trainees may volunteer with the chapter anytime after they pass the background check, but they cannot enter AT/service hours nor accumulate credit towards hours needed for certification until they have attended the first training class.

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## The Recycle Bins

VMS has a Recycle Bin folder for volunteers and opportunities that are deleted. Access to those folders is restricted because we found some pretty glaring security holes when we first transitioned to VMS.

A couple of times a year we go through the Recycle Bins and clean them out.

<u>Volunteer Recycle Bin:</u>

- We will restore a volunteer if they have logbook entries associated with them.
- We will remove opportunity approvals from the volunteer that has been deleted.
- <u>Best Practices:</u> We don't encourage deleting volunteers.
    - If they drop out of a class, mark them as TMN-Interested, they may show up in a couple of years to try again.
    - If they are deceased, mark them as TMN-InActive and as Deceased on the first page of the profile document.

- If you do want to delete them, be sure there are no logbook entries or approvals associated with them.

Opportunity Recycle Bin:

- We will restore an opportunity to the chapter folder if it has any logbook entries associated with it and rename it "RECYCLE BIN:"+Opportunity Name.
- We will remove volunteer approvals from the opportunity that has been deleted/restored.
- At that point the admin has some work to do:
  - Accept the restore as is and remove 'RECYCLE BIN" from the name.
  - Move the logbook entries to another opportunity and then delete the opportunity again.  (And sorry, there is no way to change the opportunity on a logbook entry, you have to delete and recreate it... but we keep asking for that ability).
- Best Practices: We don't encourage deleting opportunities - just mark them as Expired.  If you do want to delete them, be sure that there are no logbook entries or approvals associated with them.

Logbook Recycle Bin:

- There is no logbook recycle bin.  Once deleted they cannot be restored.

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# iNaturalist & eBird Hours Guidance

Michelle - Summary of new guidelines

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# Virtual Volunteer Fair Notes

- When Approving hours, do so from the Volunteer Tab, not the Opportunity Tab to avoid approving hours for volunteers in other chapters
- If they are reporting service hours to a 'place-based' opportunity, then it should have an opportunity in the chapter.
- If it is a virtual service event, report the hours under the statewide Volunteer Service Fair opportunity

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# 2020/2019 Data Review

We finished the 2020 Data Review and went over the results.

You can find the report here.

A few notes about the 2020 review.

- Normally we cover more than a year when we pull the data for our stats, but this year we stopped it at 12/31/2019 because 2020 was such an anomaly.
- The data should be taken as trends, not as a snapshot or precise data. This data changes on a daily basis and is subject to the work that we do cleaning up old opportunities or volunteers and when we pull the data for your chapter.
- We did run some numbers around October of 2020 that indicated we lost about 20% of our volunteer hours based on CoVid. While that's not great, it's better than we expected.

## Book Club Type Opportunities for AT

There was a question about the proper procedure for counting book club type events as AT in VMS. Here are some highlights from the guidelines found in the CMOP, page 15:

- All videos, DVDs, and archived webinars should follow the guidelines setup for all other opportunities in the chapter and must be relevant to the Master Naturalist program mission.
- All efforts must be made for a Chapter Member to introduce the resource and lead a Q&A discussion following its conclusion.
- Specifically for Book Clubs, credit may only be received for the club discussion and presentation, but not for time spent reading the book.

## Recent VMS Upgrade

Samaritan processed an upgrade to the VMS system on 3/22. We are now seeing names attached to some grids and filters. We believe that is a function of permissions that they have turned on. It might allow us to share grids and filters. We are looking into it and how we might make it less distracting. We also had them delete a new button on the volunteer logbook grid call 'Sign Out'. It had to do with a kiosk functionality that we don't use.

We also discussed differences between the TPWD instance and the TMN instance of VMS. An 'Instance' is the user interface that someone sees when they access the database. For instance (no pun intended): When you get to the data using the TPWD instance, the dashboard shows your TPWD hours, but when you go in through the TMN instance you see your TMN hours and AT hours.

We also discussed eRecruiter on mobile phones. Some phones handle it better than others, some operating systems on some phones handle it better than others. It is a hard problem to document, duplicate and fix. Here are some tips to finding out where the issue is: Try it on a different phone (brand and/or model). Try it before and after an upgrade to the OS. Try it after a hard reboot and clearing of the

cookies.  Submit a help desk ticket if you can't get it to work and we can try to walk through it with you.

## Quick Links

Get quickly to the help desk: **TXMN.org/help**

Slack Channels: **TXMN.slack.com**

Check your public facing chapter page: **TXMN.org/apply**

Login Page: **TXMN.org/hours**

Admin Login Page: **TXMN.org/coordinator**

**Don't forget to report your Texas Master Naturalist volunteer time!**

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