TMN/VMS Newsletter

The Transfer Process

Communication is the key to a successful transfer. The losing chapter Hours Keeper must send information about the volunteers to the acquiring chapter's Hours Keeper. A list of all hours keeper's contact information is on the help desk.

The Losing Chapter...

The losing chapter will make sure the volunteer's information is correct and up-to-date (milestones, recertifications, background checks, etc). Be sure to approve all logbook entries.

Send the receiving chapter a note with their current status , hours & dues paid. The losing chapter will then unapprove them from all of their opportunities.

Finally, the losing chapter will <u>move</u> them into the transfer folder.

The Receiving Chapter…

The receiving chapter will create the transfer documents (using a non-opportunity survey) with the current year and historical year hours.

The receiving chapter will <u>copy</u> them into the receiving chapter folder from the transfer folder, then update the current chapter field in the volunteer profile and make sure their contact information is still correct. Then approve the volunteers for appropriate opportunities in the receiving chapter.

(Either chapter may fill out the transfer documents. Depending on the timing of the transfer, it may make more sense for the losing chapter to create the hours transfer documents.)

The detailed, step-by-step, guidelines to transferring a volunteer to another chapter are listed on page 28 of the Admin Guide on the Help Desk.

Caution !
What Folder Are You In?

Always remember to be sure to check what folder you are in before running automations. Always run them from your chapter folder.

You can stop the automation if the count doesn't look right.

TPWD Background Checks

TPWD HR is working on reducing the background check backlog.

The Roll-out Stats!

- 63 - The average number of opportunities per chapter.

- 133 - The average number of days for a chapter to complete the roll-out (from initial contact to volunteer data entry)

Special points of interest:

- TRANSFER PROCESS

- ROLL-OUT STATS

- FIELD IN FOCUS: CHAPTER FIELDS

- WHAT FOLDER ARE YOU IN?

- THE SURVEY NOTES FIELD

- NEW ADMIN TRAINING

- AUDITS

- DEFAULT BIRTHDATES

- BACKGROUND CHECK STATUS

Completed Chapters

- BRAZOS VALLEY

- EAST TEXAS
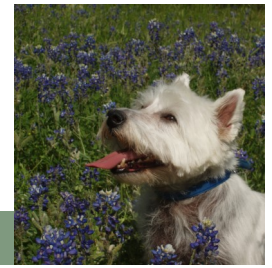
- SABINE NECHES

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Default Birthdates

To help eliminate duplicate volunteer error messages, we assigned default birthdates from 1/1/1900 to 8/1/1903.

The dates were arbitrary. You don't have to use the ones assigned for your volunteers without birthdates.

Audits

We're still working on audits of chapter data.

We are looking at things like the logistics tab, approvals for   In-active volunteers, Organization names and appropriate opportunity categories.

Type = Category = Note/Description

Report Service

Please select from the following survey(s):
[AT: Master Gardener Seminars:TMN Report Hours ▾]

What type of Hours are you reporting?
◉ Advanced Training ○ Chapter Administration ○ Service Project

Service Date: 03/17/2016 📅

Advanced Training

How many hours was the training?: 1
What did you think of the training?: [Loved It ▾]

Describe your service or training: [Lecture by Greta Gardner – Lake Waco Eagles]

The Opportunity Type (AT or Service) must equal the Opportunity Category.

If the title isn't explicit, then the volunteer should also put a description in the logbook entry. That helps the approver identify the hours worked.

Remember the state auditors also look at these descriptions, so keep them complete and appropriate...

Field in Focus - The Chapter Fields

The Current Chapter is used by the Background Check card email. Be sure to type out the whole name of the chapter followed by 'Master Naturalists' so that it reads properly on the Background Check card. The Current chapter field is also used in our grids and is critical to helping Admins find people quickly in the All Data, Inbox, MyData and Recycled grids.

The other chapter fields are useful for Admins when volunteers transfer between chapters, or if you have an emeritus member.

Chapter
Chapter Trained In: Heart of Texas Master Naturalists
Chapter Certified In: Heart of Texas Master Naturalists
Current Chapter: Heart of Texas Master Naturalists

In conjunction with the Master Naturalist Comments field, it can really help tell your volunteers' history.

New Admin and Refresher Training

Before you pass on your eCoordinator admin ID or assign a new person responsibility to access eCoordinator, the new admin must go through training with one of the Implementation Team. The President must make the request for an ID change or addition to the implementation team.

We will be holding 2 trainings a month (one during the day and one in the evening). We will also be holding refresher training if it's needed. Put in a help desk request to get in on a class. Sign up on the help desk.

Need Help? Find it here: txmn.org/help

Quick Login for hours: txmn.org/hours *-or-* tpwd.samaritan.com

Quickly go to the search page: txmn.org/apply