

## Administrative Tasks

How To ...	When
<b>Add New events</b>	
Tab: Opportunities Refer to New Opportunity Data Flow	When required
<b>Check for New Opportunities</b>	
Tab: Opportunities Select: 'New Opportunity'   Your Chapter opportunity. Select: [Logbook]-Only Selected Opportunities Grid: TMN Standard-New Opportunities Edit: Each Opportunity, review to see if it's a new opportunity or someone who just needs to be approved for an existing opportunity. Email: If you have setup email templates you can send the volunteer an email either telling them they are approved for an existing opportunity or their new opportunity has been put in the system. <b>New Opportunity:</b> If it's a brand new opportunity that needs to be routed to your project committee, create a report (edit and print the logbook entry) and send it to the appropriate personnel. <b>Delete:</b> the New Opportunity Logbook	A couple of times a month
<b>Change Volunteer Information</b>	
Tab: Volunteers Select: Specific Volunteer and then Edit  The Birthdate field on the Personal Tab must be filled in before any Volunteer data can be changed. If unknown, use 1/1/1900*  Make sure to add the Volunteer's class year and dues (if your chapter collects them) in the User Defined/Certifications tab/group Add other information such as past annual recertifications in the Certification Comments field if desired.  Never change the volunteer status on the first page (this is the TPWD status and can impact them in other TPWD agencies). One exception: You can change it to deceased  *birthdates are required for the volunteer background check	Ongoing effort. Make these changes as you edit Volunteers for certifications and recognition
<b>Check for Milestones and Recertification's</b>	
Tab: Volunteers Grid: TMN Standard Select: Don't select any volunteers Select: [Log Book] all volunteers in grid Grid: TMN Standard-Awards & Recognition Adjust the dates to see current year or cumulative awards Or - Use one of the preset grids for milestones & recertifications	Before your meetings or newsletter publications.

<b>Check for Approvals to your chapter 'Apply to' opportunity</b>	
<p>Tab: Volunteers</p> <p>Grid: TMN Standard-Inbox</p> <p>Select: Find volunteers that are approved or requested to your chapters 'Apply To' opportunity. Mark them as 'TMN-Interested' and move them to your chapter folder. Add your chapter name to the User Defined/Certifications/Current Chapter field.</p> <p>If the potential volunteer has applied to more than one chapter, contact them to see which chapter is the best fit</p> <p>Review as necessary when recruiting for new volunteers</p>	Bi-Monthly or Monthly
<b>Approve Logbook Entries</b>	
<p>Tab: Volunteers</p> <p>Grid: TMN Standard</p> <p>Select: All volunteers</p> <p>Select: [Log Book] selected volunteers</p> <p>Grid: TMN Standard-Not Yet Approved</p> <p>Grid: Change to Detail mode</p> <p>Review logbook entries –</p> <ul style="list-style-type: none"> <li>• Confirm that AT hours are in AT column and VH or Admin hours are in TMN Hours column</li> <li>• Confirm that the logbook notes match the Opportunity Type and Federal Category</li> <li>• Sort and look for duplicate entries on same day</li> <li>• Confirm Hours for each entry is consistent with time period (e.g. way less than 24 hours unless it's a Field Research opportunity)</li> <li>• Flag or question any LBE that is over 14 hours (unless it's Field Research)</li> <li>• Make sure that LBEs don't span days (unless it's Field Research)</li> <li>• Use the column sorts to check for hours and anything else that looks odd (including objectionable language)</li> <li>• Check for impact data on Direct and Indirect training opportunities</li> <li>• Make sure that Administrative Entries have a sub-category</li> </ul> <p>If you have questions for the volunteer: Create a logbook grid report and send the pdf to the volunteer for resolution</p> <p>Select: [Approval] selected entries</p>	Before your meetings or whenever necessary depending on volume.
<b>Cleanup Opportunities and Approvals</b>	
<p>Tab: Opportunities</p> <p>Grid: TMN Standard</p> <p>Sort: by Display End Date</p> <p>For those opportunities that have expired</p> <ol style="list-style-type: none"> <li>1. You may want to 'UnApprove' the volunteers placed with that opportunity so it no longer shows up in their drop-down box for hours reporting.</li> </ol>	Quarterly or Semi-annual

<b>Check for Inactive Logbook Data</b>	
Tab: Volunteers [Clear Filters] Grid: TMN-Standard Name Search: blank Master Naturalist column = TMN-Inactive, [Find] to refresh Select all volunteers in grid Pull up the Logbooks for all volunteers in the grid Adjust the relative date range for the current year There should be no logbook entries for volunteers that are inactive*. If there are, research the entry and adjust as required. *There may be entries for volunteers that were marked inactive during the year	Quarterly or Semi-annually, or when an inactive volunteer returns to active volunteer status
<b>Check for Future Date Logbook Entries</b>	
Tab: Volunteers Select all volunteers in grid Select Relative Date Range: This Year Select Specific Date Range: Start Date = Today Research the entry and adjust as required	Quarterly
<b>Adjust approvals &amp; status for your training class</b>	
Be sure only your training class participants are approved for the “Initial Training” opportunity. Adjust their TMN status as they complete their training (40/40/8)	Monthly, and before/after a training class