Volunteer Management System

Administrator Guide for
Texas Master Naturalist Chapters

17 April 2024

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INTRODUCTION

In 2010, the Texas Parks & Wildlife Department recognized that the agency was not able to accurately track volunteer hour contributions. The desired outcome was to improve the agency's efforts in support of the goals set forth in the Land and Water Resources Conservation and Recreation Plan to "Encourage volunteerism in support of conservation and outdoor recreation."

Out of this project several recommendations were made:

- Enhance volunteer recognition
- Develop and provide volunteer management training
- Create a volunteer web portal
- Acquire a centralized agency-wide volunteer management software system to manage volunteer resources
- Fund one FTE to manage agency volunteer efforts

As a result, the agency licensed to use a web-based volunteer management software system from 'Samaritan'. Samaritan's VMS features allow access to online- application, review and selection of applicants, track criminal background checks, schedule and track hours, track performance and recognition milestones, and generate reports. In Summer 2023, the Agency renewed the contract with Samaritan and contracted for an upgraded, more functional the version of software.

The benefits of centralizing volunteer management efforts within the agency will enhance the agency's volunteer recruitment efforts, facilitate efficient program administration and accounting of volunteer service contributions across all programs and provide accurate reporting.

In 2012, an evaluation study of the Samaritan system was conducted using three Texas Master Naturalist chapters. Results of that evaluation study were used to modify the system used by other Texas Parks and Wildlife programs to accommodate the needs of the Texas Master Naturalist program. In the spring of 2014, a call went out to Master Naturalist chapters for persons interested in being part of the Samaritan implementation team for the Master Naturalist program. A team of four Master Naturalist volunteers was formed who were tasked with suggesting further modifications to the system, developing a roll out plan, establishing a feedback and helpdesk system, producing system documentation, and conducting training in the use of the system. The resulting Samaritan system that has been modified for the Texas Master Naturalist program is referred to throughout this document as the Volunteer Management System (VMS).

TPWD VOLUNTEER PROGRAMS

TPWD has specific volunteer programs to support many different areas of our agency. Some examples of existing programs are

- Angler, Boater and Hunter Education
- Archery In the Schools
- Buffalo Soldiers Heritage and Outreach Programs
- Coastal Expo
- Life's Better Outside Experience
- Sea Center Texas
- State Parks
- Texas Freshwater Fisheries Center
- **Texas Master Naturalist**
- Texas Nature Trackers
- Texas Outdoor Family
- Texas Youth Hunting Program
- Wildlife Management Areas

Confidentiality Agreement for Volunteers

During the course of your volunteer service and scope of duties with the Texas Master Naturalist Program, you may have access to confidential information and/or data (defined below) concerning resources, finances, volunteers, employees, and users. This requires a commitment to protect individual, program and sponsoring agency privacy and sensitive information. Unauthorized use of and/or disclosure of certain data and other sensitive information may create legal liability, put sensitive natural and cultural resources at risk, and cause a loss of public confidence in the program and its agency sponsors.

BY SERVING IN SUCH POSITIONS YOU AGREE NOT TO DISCLOSE CONFIDENTIAL INFORMATION TO PERSONS WITHIN OR OUTSIDE THE ORGANIZATION WITHOUT AUTHORIZATION FROM YOUR PROGRAM AND/OR CHAPTER LEADERSHIP OR SUPERVISOR (where applicable). FOR THE PURPOSES OF THIS AGREEMENT, CONFIDENTIAL INFORMATION INCLUDES, BUT IS NOT LIMITED TO:

1. Personal information, such as home addresses, email addresses, telephone numbers, Social Security numbers, driver's license numbers and birthdates of employees, volunteers, or customers, regardless of where stored, including the TMN VMS, sponsoring agencies or non-sponsoring agency's hosted electronic files and data systems (i.e. computers, phones, databases, spreadsheets, etc.) and passwords.

2. Information about the nature or location of any area, structure or feature (natural or man- made) that the program and/or agencies consider to be sensitive. This includes but is not limited to information on the location of archeological sites, non-publicized cave or cave-like features, or the location or data about endangered species.

3. Information or data stemming from conducting or assisting with archaeological site monitoring, surveys, testing and excavations; flora/fauna surveys and studies; and other scientific research conducted by a TMN Program or agency volunteer.

4. Proprietary information, including information related to revenue or revenue systems, data or data collection systems, or scientific or surveying processes.

5. Any other information deemed sensitive or confidential by the sponsoring agencies.

Please understand that it is everyone's responsibility to protect sensitive program and agency information during and after any term as a volunteer. Any unauthorized disclosure or use of data or information, physically or electronically, will be subject to disciplinary action including termination of membership in the program and/or other legal remedies available under applicable laws, program and/or agency policies and procedures.

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VOLUNTEER MANAGEMENT SYSTEM (VMS) WEB PORTAL

Once you have been identified by your chapter President to be a VMS administrator, you can schedule your VMS administrative training through the TMN Help Desk. As a trained VMS Chapter Administrator, you will need an administrator user ID different from your VMS volunteer user ID. Typically, administrative user ID's will contain the suffix "–Admin". This user ID will be provided to you at the time of your training or shortly before by the VMS admin trainer. **You should not use another administrative user's user ID**.

Important: User ID's and passwords should be assigned to and used by only one volunteer; no user ID should be shared among two or more volunteers for any reason.

The name of the module used to administer the VMS at the chapter level is "eCoordinator"; with the installation of "eCoordinator" version 8.3, the sofware has been successfully tested with Google Chrome, FireFox, Safari, and Edge.

To log onto the VMS as an administrator, use the URL below. Enter your administrator user ID and password (the password is case-sensitive and does not display the characters you enter). **Additionally, you will need a fairly robust (speed wise) Internet connection** in order to achieve reasonable response time.

https://tpwd.samaritan.com/coordinator/

   or,

txmn.org/coordinator

Please note that this is a different URL than the one used by volunteers to report their hours.

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FOLDER MANAGER

The Folder Manager contains folders marked:

- **All Data**- will include all the data to which you have access

- **Statewide**- will contain those opportunities created by the State Program Office for use by all TMN chapters; log book entries posted to these Statewide opportunities are visible to all chapter administrators. As a result, when a volunteer transfers to another chapter, the Statewide log book entries are not include in the Non-Opportunity log book entrues.

- **Inbox –** This folder is common to all chapters; it contains profiles for new potential volunteers (those who have been "shared" from TPWD and those who registered directly through the TPWD website. Those potential volunteers who are interested but have not yet committed to the TMN program may be marked as "TMN-Interested" and allowed to remain in the Inbox folder.

- **Your Chapter Short Name**- this folder is created when a chapter has been entered through "eCoordinator"; system administrators should always ensure their chapter is highlighted in red before performing work in the system.

If red and/or green chevron (<) appear next to the folders: a green chevron means the selected record may be copied to that folder or may be shared with another folder; the red chevron can remove the record from the folder to the Recycle Bin.

MODIFY YOUR CHAPTER'S SETUP

1. The basic information for your chapter profile should be created for you prior to the initial administrator training. Once you receive your administrator user ID, you should log in and update (Edit) the information about your chapter using the "Chapters" tab.

2. You may make changes to that setup by following these instructions. Log into the Volunteer Management   System "eCoodinator" module at:

   https://tpwd.samaritan.com/coordinator/

   click on the Chapters tab and select, form the Folder Manager, your chapter's folder; your chapter name should display in red. The Chapters data grid displays.

3. Ensure you have selected your chapter's name (click in the box to the left of your chapter name). **ALL work you do should be in your chapter's folder; we cannot emphasize this enough. Always ensure your** chapter's name is **highlighted in** red in the Folder **Manager. If** you do not see your **chapter listed,** please submit a **ticket on the** help desk (**http://txmn.org/help**

)
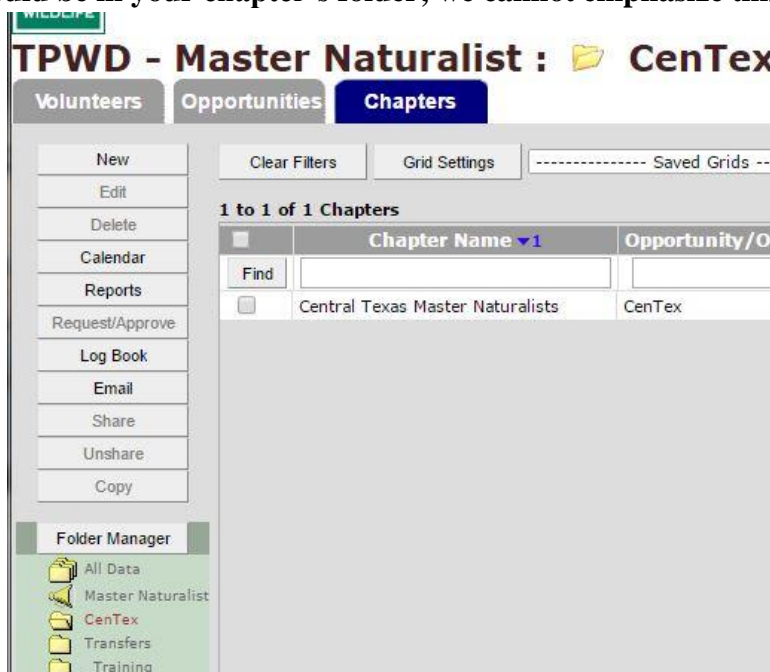
4. Once you select your chapter and click the menu item "Edit", the Chapter Profile page will be displayed (as in the screen shot below). Select the "Main Info" tab:

Chapter Profile: Central Texas Master Naturalists

| Main Info | User Defined | History | Approvers |

* indicates required fields

Chapter information

*Chapter Name: Central Texas Master Nat
*Registered date: 06/11/2014
Street Address 1: 1605 N Main St
Street Address 2:
City: Belton
State: Texas
County: Bell
Zip: 76513
Country: United States

Opportunity/Organization Contact: CenTex
Primary Phone: (254) 760-4739
Secondary Phone:
Fax Phone:
Email Address: centraltxmn@gmail.com
Alternate Contact Name:
Alternate Contact Phone:
Alternate Contact E-Mail:
Web Site: txmn.org/centraltexas

You need a User ID and Password (at least 6 symbols) to register service opportunities and edit information.
User ID:
Password:
Password Verify:

| Next | Apply | Finish | Cancel |

Figure EC.2

Notes:

- The Chapter Name field must be completed as a required field. The chapter name must include your chapter's name followed by "Master Naturalist" (this is the name that displays in the online search of opportunities).

- Registered Date is the date when the program was added to the Samaritan system. This date is the date on which the program was created or established in the VMS.

- Use your **unique Chapter Short Name** for the Opportunity/Organization Contact. This field shows up in the eCoordinator grid; it can be found in the Appendix of this manual. You are encouraged to NOT use a person's name here as that will require physically updating each opportunity when that name changes.

- Primary Phone is the phone number that the chapter normally publishes

- Enter the fully qualified email addresses for your chapter or your chapter's contact

- Alternate contact name, phone & email can be used for your President, Volunteer Coordinator or other officer of your choosing or it may be left blank.

You may ignore the User ID and password set up in the lower right hand corner; the function of this user ID is performed using your eCoordinator user ID for TMN.

5. Click on the "User Defined" tab (or click the Next button at the bottom of the page).

6. From the drop down "Division" item, **"Wildlife"** division should already be selected for you. There can only be one division assigned to each chapter; **for all Master Naturalist chapters the Division is "Wildlife"**. **Note:** This is a required field to complete for reporting purposes. Click on the "Geographic Area" item and select your chapter's geographic area from the drop-down list on the right; the chapter Geographic Area is also included in the "Chapter Short Name List".

7.   Click "Finish". The "History" tab is where the system records changes made to this chapter entry; it can be useful in determining when and who made what changes.

8. You may ignore the "Approvers" tab as it is used to designate approvers who are not in your chapter and the use of it is discouraged.

OPPORTUNITIES TAB

RENAMING COMMON OPPORTUNITIES

Please, do not change the title of the common opportunities listed below:

Historical Data Service Hours,

Historical Data AT Hours,

Apply to <your chapter>,

Initial Training,

Administrative Work

Changing the name of these opportunities can impact how the system behaves and makes troubleshooting more difficult. The title of the opportunity "Community Presentations", however, may be changed as needed by the chapter.

CREATE A CHAPTER OPPORTUNITY

After the service projects and advanced training for your chapter have been initially reviewed and approved by the appropriate committees and Board, the "opportunity" (or chapter service project/Advanced Training) can be set up in the Volunteer Management System. The questions to be answered in preparation for setting up the volunteer opportunity are:

- Opportunity Title- If the opportunity is advanced training, precede the title with the characters AT: (for example, **AT: Native Birds of South Texas**)

- If the service opportunity is conducted at a State Park, the name of the State Park must appear in the opportunity title; this is so the State Parks can retrieve their volunteer hours through VMS

- Description of the opportunity- what work is being done on the project, is there any specific equipment that a volunteer will need to bring?

- Information about the Opportunity: Federal Reporting category (see the Opportunity Category Definitions in the Appendix), opportunity type (Service Project, Advanced Training, Initial Training)

- Location of the opportunity- address where the project takes place, address. Note: ONLY check the "Same as Chapter" box if the event is taking place at your chapter address.

- Contact sponsoring organization- for the opportunity - including phone, email address and if the project info has a website for other resources about the project; ordinarily, this will, usually, NOT be the chapter but a partner or other sponsor

- Date of project creation and approved for all the chapter volunteers

When the chapter approves a service opportunity for Master Naturalist hours, even though it may already be in the TPWD system either with another chapter or another TPWD agency, the opportunity **will also need to be set up specifically for your chapter**. If the opportunity is not set up as a Master Naturalist opportunity for your chapter, then members who worked on that project **will not be able to report to it and receive Master Naturalist service credit for it**. To create opportunities in the VMS, you must have a VMS admin user ID.

To create a new chapter opportunity (service or AT):

1. Log into the Volunteer Management System "eCoodinator" module and click on the "Opportunities" tab. The Opportunities/Service Projects data grid appears. **Ensure you are in your chapter's folder (the name will be in red in the Folder Manager)**; click the "New" button in the menu on the left.

The New Opportunity Profile page appears. On the resulting data grid, use the Main Info tab to complete the required "Opportunity Title" and the "Description".

It should be noted that the "Description" entered here will appear on the volunteer's survey when they record their hours; it should help them ensure they are about to post hours under the correct opportunity.

Important Note: once hours have been logged against an opportunity, do not delete the opportunity. If it is necessary to remove an opportunity, first record ALL log book entries, delete each entry, then "Unapprove" any volunteers who have been approved to the opportunity; only then may the opportunity be deleted (you will need to repost the hours that you recorded and deleted under a new or existing opportunity).

The hours stay with the opportunity, not with the volunteer. Even though a volunteer may depart your chapter, so long as the opportunity remains in your chapter, the hours will be attributed to your chapter.

2. Using the "Main Info" tab, enter the **name** of the opportunity**.** If this is an Advanced Training Opportunity, start the name with 'AT: '. If the opportunity is service at a State Park, include the name of the State Park in the title. Enter the **description** of the opportunity. Be descriptive, this is the description the volunteer sees when the use the "View My Placements" item on their "Dashboard". Do not use ampersands ('&') in the description, they will not translate on the online system. Use the word 'and' instead of the ampersand.

You may **<u>add a hyperlink</u>** or an image to the description text box using the palette above the description text box. To add a hyperlink (say, to your chapter's website), after entering the text you wish to display as the description, click on the left most palette item for the hyperlink. For example, in the resulting dialog box, enter:

    a. URL: as <u>http://txmn.org/mychaptername</u> (replacing the txmn.org/mychaptername with   your chapter's actual URL)

    b. Text to display: enter the text that will serve as the hyperlink text

    c. Title: enter what you would like displayed when the user hover's over the URL

    d. Target: New Window

3. Section - Click "Next" or click on the "Chapter" tab.

New Project Profile

Main Info	Chapter	Job Category	Contact Info	Location Info	Logistics	Additional
Approvers	History	Attachments	Surveys	Geographic Area		

*Under which chapter does this project fall?

Chapter List

○ _Training

○ Central Texas Master Naturalists

Find results for...

[Find] [Show All]

[Prev] [Next] [Apply] [Finish] [Cancel]

If there is more than one chapter name in the list, select your chapter's name from the list by clicking in the circle to the left of the name.

Note: This ties your chapter's projects to your chapter. Please make sure you select the correct chapter/program or else the hours your members report will not be allocated properly (and they may not receive Master Naturalist credit for them).

4. Click "Next" or click on the "Job Category" tab.

"Texas Master Naturalist" should already be selected as the job category.

5. Click "Next" or click on the "Contact Info" tab.

Fill in the Service Project Contact information for this project opportunity. Although there may be a chapter contact identified in the "Alternate Contact Name" and "Alternate Contact Phone", the "Opportunity/Organization Contact" should be the name of the organization sponsoring the event/activity. This may be the chapter name if the event is truly sponsored by the chapter; in most case, though, it will be a third party organization or sponsoring agency (i.e. Aransas National Wildlife Refuge). The alternate contact person can be the name of the chapter project coordinator if the primary contact is an organization.

If the service project contact information is the same as the TMN Chapter/program contact information then put a check mark in the "Same as chapter" box and the contact information will be copied from the Program fields

6. Click "Next" or click on the "Location Info" tab.

Project Profile: Miller Springs Nature Area Workday

Main Info	Chapter	Job Category	Contact Info	Location Info	Logistics
Additional	Approvers	History	Attachments	Surveys	Geographic Area

Please enter the location where service will occur

☐ Same as Chapter

Description of location:

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Address 1: Belton Dam
Address 2:
City:
State: Texas
County: Bell
Zip: 76513
Country: United States
Phone:

Just North (immediately on the East side of the road after crossing) of the Belton Dam Spillway; pull into the the Nature Area parking lot)

Show Map

Prev	Next	Apply	Finish	Cancel

If the location information is the same as the program/Chapter contact information (your chapter's main office or contact) then put a check mark in the "Same as chapter" box and the location information will be copied from the Program fields. This will be the case if your service project opportunity is Chapter Business, Administration and/or planning.

Enter the description of the location. This is where you can specify directions to the location and landmarks for the service project.

7. Click "Next" or click on the "Logistics" tab.

Project Profile: AT: Flying Wild

| Main Info | Chapter | Job Category | Contact Info | Location Info | Logistics | Additional |

| Approvers | History | Attachments | Surveys | Geographic Area |

Minimum age of volunteers [ ]
Number of volunteers needed* [ ]
*do not use if creating shifts for this opportunity
How many hours will volunteer serve per week? [ ]

Project Creation Date: 03/01/2018
Project Expiration Date: [ ]

Display Begin Date: [ ]
Display End Date: [ ]

Volunteers who sign-up for this activity on their own should be:
☑ approved
☐ requested
☐ approved into schedule slots if already placed with project

☐ Hide from search results
☐ Display opportunity only when eligible users

a. Enter the project creation date

b. Entering a Project Expiration Date will effectively deactivate the opportunity on that date

c. Select "Approved" – meaning volunteers must be approved to the opportunity

d. Volunteers can log hours against an opportunity as long as the volunteer activity **occurred within 45 days of the current date (date of posting)**.

(Logistics tab continued)

Mark the opportunity as Requested, Approved or Scheduled Slots. It is suggested that you mark all project opportunities as "approved". This instructs the system how to handle the volunteers when they sign up for an opportunity:

Volunteers who sign-up for this activity on their own should be:
☑ approved
☐ requested
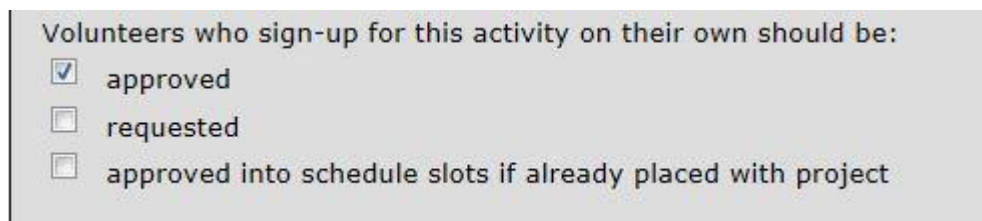☐ approved into schedule slots if already placed with project

Approved: **Select this for all service project opportunities.** This option allows for volunteers to be automatically approved for the opportunity. You should select this option when you have an opportunity that doesn't require screening and approval for volunteers. This option also streamlines and minimizes the work required of the chapter system administrator and the volunteers.

Requested is the system default. If you don't make any selections here, the system will "request" the volunteer to your opportunity when they sign up, which requires you to approve them for the opportunity before they will be allowed to report service for this opportunity. For projects involving direct contact with youth or projects that require specific skills or training, you may want to use this "Requested" function so that a chapter administrator may review the list of participants expecting to work on this project.

Approved into Scheduled Slots: This option relates to opportunities that have been set up with schedule slots using the eCoordinator calendar. If you select this option the system will allow volunteers who have been previously approved for your opportunity to sign up for any schedule slots (shifts) within that same opportunity without approval. If this option is selected, it is imperative that you also select the option "requested". This tells the system what to do in case the volunteer has not yet been approved for this opportunity. In this case, it "requests" the volunteer to the opportunity if they have not yet been approved, if they have been approved, it allows them to select their shifts without further approval

8. Click "Next" or click on the "Additional" tab (Note: we do not use the Approvers tab)

    a.   On the "Job Rate" item, ensure **$23.00** is selected for <u>ALL </u>Master Naturalist Opportunities (service and AT) conducted **after August 31, 2014**.

Project Profile: AT: Flying Wild

Main Info	Chapter	Job Category	Contact Info	Location Info	Logistics	Additional
Approvers	History	Attachments	Surveys	Geographic Area		

Group

Job Rate
Facility
TMN Federal Reporting
Agency Reports
Availability
Orientation/Training
Opportunity Type
Skills, Interest, or Equipm
Service Project Activity
Certifications

Job Rate for this service opportunity: $23.00

    b.

    c.   Select "TMN Federal Reporting" **<u>for all opportunities you will set up</u>**. Answer the questions that appear as they relate to the project (see the table in the Appendix).

    d.   **What category:** Select from the drop-down the category that fully describes all activities of the project – see the Opportunity Category Definition table in the Appendix of this manual)

    e.   On the "Opportunity Type", select the type of opportunity this is (Advanced Training or Service Project or Initial Training - Trainees).

    f.   <u>Order status and short form </u>items are not used by TMN chapters

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9.   If you have attachments (photos or a flyer), click on the "Attachments" tab, otherwise, it may be skipped. You can upload an image or a document using this tab. The only file type that can be uploaded for opportunity images is a "jpg" or bmp.

- Click on the type of attachment (Opportunity Document, Opportunity PDF, Opportunity Image – shows in the search page, or TPWD – Master Naturalist attachment)
- Click Browse to locate and select the image on your computer.
- Click the Upload button.
- Repeat the steps to load another type of document for download by the user
- When finished, click on "Apply"

Note: You should be able to view the image in the Image Thumbnail. If it does not appear then the file may not be the appropriate size or type

10. Click "Next" or click on the "Surveys" tab to assign a survey to the opportunity for the volunteer members and project coordinators to submit their hours and impact data. If you do not select a survey, the opportunity will NOT appear in the volunteer drop-down list.

A list of available surveys will be listed on the left. Field Research hours can be reported over multiple days, be sure to use the survey "TMN Field Research". For AT opportunities that may **only be reported once, use "TMN AT Report Hours-1X*"**.

Select a survey on the left and click the right double chevron (>>) in the middle to move the survey to the right box. This will assign the survey to the opportunity. **All TMN service projects should be assigned one and only one survey.** This is how members will report their service time to the project and the TMN program. This is also how project coordinators will report demographic impacts on the project as well. NOTE: Service Project Coordinators (or their designee as the project lead for the day) will want to review and complete the "Project Impact information" listed toward the bottom of the survey. Any other members working on the same project for that date would only need to fill out the service time (top) portion of the survey to report their hours.

TMN Initial Training Hours: used by trainees reporting their initial TMN Curriculum training hours (these hours do NOT count towards milestones nor towards certification

TMN Field Research: for those opportunities designated as category "Field Research" use this survey; it provides a start date and an end date allowing for a date range

TMN Admin Report Hours: used specifically for the Administrative Work opportunity

TMN Report Hours: the default survey used for most service opportunities (may be used by the volunteer multiple times for the same opportunity – recurring/ongoing activities)

TMN-Report Hours-1X: just like TMN Report Hours except the volunteer may only complete the survey one time for the given opportunity, then the opportunity will be removed from their drop-down list

TMN AT Report Hours: used to report advanced training hours

11. Finally, click "Next" or click on the "Geographic Area" tab.

Check the region that best applies to your opportunity – the geographic area can be found on the
Chapter Short Name list.

 Click on "Finish" to save the new opportunity and return to the opportunity grid.

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NON-TRADITIONAL ADVANCED TRAINING

There previously had been a limitation concerning the number of Advanced Training (AT) hours that could be earned via web-based training. Due to the improved quality of such training and the wide range of offerings available from organizations whose objectives closely align with those the Texas Master Naturalist, those restrictions have been lifted by Michelle Haggerty. The volunteer who is wishing to earn such hours should **always get approval** from their chapter AT committee before attending any training.

PUBLISH TO THE WEBSITE

<u>Chapters should NOT publish their opportunities to the web</u> (other than the "Apply to… Chapter") as doing so will likely result in "hidden log book entries". That is, volunteers may sign up through the web for published opportunities but when they report their hours, local chapter hours approvers will not be able see them for approval.

Your chapter's "Apply to…Chapter" opportunity is already published to the TPWD web site; and should be the only opportunity in the "Master Naturalist" folder. The "Apply to…" opportunity provides the mechanism for trainee volunteers to apply specifically to your chapter on-line. This will cause the selected opportunity to be displayed in a Search of the TPWD opportunities. Any updates made to your opportunity will automatically be reflected in the TPWD display of the opportunity.

If your volunteers attend an opportunity that is not in your list of approved opportunities, they should be instructed to use your chapter's procedure for "requesting a new opportunity". In doing so, they should provide your administrators with the necessary information to determine if the opportunity is appropriate for your chapter whether it be advanced training or service. If the new opportunity is approved by your chapter, the approver should enter it into your chapter's list of approved opportunities and then approve the necessary volunteers to it letting volunteers know that they may now post hours against it. Chapter's may not share volunteers; a volunteer may only be a member of one chapter at any given time.

In setting up the new opportunity, on the Contact Info tab, be sure to set the Opportunity/Organization Contact to be the name of the organizing chapter or the organization actually responsible for putting on the activity (such as NPSOT, TPWD, AgriLife, City of xxxx, Corps of Engineers, etc). The Master Naturalist chapter is most often NOT the Opportunity/Organization Contact.

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DELETING AND RENAMING OPPORTUNITIES

<u>Opportunities should not be deleted</u>; deleted opportunities have implications not only for your chapter's data, but for data extracted by the State Program Office**.**

Opportunities that appear on volunteer's dropdown selections or that have ever had any hours associated with them should *never* be deleted. If you have questions about deleting an opportunity, please submit a Help Desk ticket (txmn.org/help).

At the same time, there may be cases where the opportunity will never be used again even though one or more volunteers have used it in the past. Rather than *Deleting* the opportunity, use the following steps to *Retire* it.

- Approve or resolve all outstanding unapproved hours associated with the opportunity (use the Log Book menu item for the opportuntiy)

- Un-approve any volunteers who are currently approved to the opportunity (use the Approve/Request menu item)

- Edit the opportunity and, under the "Logistics" tab, enter an expiration date that is prior to today.

This will leave all old log book entries intact under the old opportunity name preventing you from having to record the entries, delete them from the old opportunity, and reenter each one under the new opportunity name.

Failure to follow these instructions, will minimally result in the opportunity continuing to appear in the volunteer drop down and, possibly, hours being lost as "ghost hours".

FUTURE LOGBOOK ENTRIES

Volunteers will occasionally erroneously post log book entries (hours) that have dates in the future (posting future dates is not permitted by the Federal Auditors). While those dates are in the future, these postings will not be viewable to VMS chapter administrators. In order to view log book entries that have a future date, the following log book settings must be in place in "eCoordinator".

Start the "eCoordinator Log Book System":

1. in the upper left corner, using the drop-down list, change the "Specific Date Range" from "Specific Date Range" to "Relative Date Range"

2. change the "Period:" from "Today" to "All Time"

3. click on "Apply"

4. in the row grid, add a "Start Date" conditional ">" value of the current date (mm/dd/yyyy) and press Enter

5. If there are records that display, they will have a future date, and you will have the ability to edit or delete selected log book entries with a date in the future.

6. You may reset the settings by changing them back to their original values identified in step 1 above and blank out the Start Date conditional expression

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STATEWIDE OPPORTUNITIES

The State Program Office makes available advanced training and volunteer service opportunities throughout the year to its membership.

The Statewide opportunity resides in the Statewide folder and is copied (not moved) to the chapter folders by the TMN VMS Support Team.

Chapter VMS administrators should NOT make any changes to the statewide opportunity as doing so will change it for all chapters; instead, if you see something that you feel needs to be changed, please submit a Help Desk ticket.

Hours approval for the statewide opportunities should be done from the Volunteers tab rather from the Opportunities tab. Using the Opportunities tab for hours approval can result in you approving hours for volunteers who are in other chapters.

Chapter VMS administrators should either approve their volunteers to the statewide opportunity or have their volunteers sign themselves up for the opportunity and communicate to them the opportunity is available. Note: having your volunteers sign themselves up **will copy their profile into the Inbox** from which they will need to be removed.

Virtual Volunteer Service Fair

Logging Hours for ATTENDING the "TMN Virtual Volunteer Service Fair"

• If not already approved, volunteers may be approved for this service opportunity by their chapter VMS admins or volunteers may sign themselves up using the link below – either action will add "**TMN Virtual Volunteer Service Fair**" to their Drop Down list so they can begin recording hours. •
https://tpwd.samaritan.com/recruiter/index.php?recruiterID=1450&class=OppDetails&opportunityID=221386

• If the Fair is a multi-day event, please create a separate logbook entry for each day you attend.
• Use the opportunity "**TMN Virtual Volunteer Service Fair**" to log hours for ONLY those project sessions you attend each day of the Fair.
• If listening to the recorded event – use the "**TMN Virtual Volunteer Service Fair**" to log time for only those sessions listened to.
• Record your hours in 15 minute (0.25 hour) increments.
• For "Service Performed": *"reviewed/attended project intros at Virtual Volunteer Fair"*
• During the Fair, two different type of service opportunities will be presented: • Virtual Service Projects
• Placed-Based Service Projects

Logging Hours for participating in VIRTUAL Service Projects

• For all truly VIRTUAL Service Projects (as listed in this document), all volunteer service hours are to be reported under the Statewide opportunity "**TMN Virtual Volunteer Service Fair**". • For the "Service Performed": enter the title of the Virtual Service Project and other information that would be helpful to the hours approver.

• To report Virtual Service Project hours, you must be signed up for or be approved to the "TMN Virtual Volunteer Service Fair"; if that opportunity is not in your drop-down list, you may sign up for it here: •
https://tpwd.samaritan.com/recruiter/index.php?recruiterID=1450&class=OppDetails&opportunityID=221386

Logging Hours for PLACE-BASED Service Projects

• For PLACE-BASED Service Projects, log your hours under the appropriate local chapter opportunity that has previously been set up by your chapter VMS admins for this service. • Depending on the Region or State Park, many of those opportunities may already be in your local chapter Opportunities list (drop-down list).
• Check with your local Chapter VMS admin if you are selecting a project that is not within your chapter's service area or that is otherwise not currently in your drop-down list of approved opportunities before you participate in the opportunity.

VIRTUAL Service Projects

Attending any, or all, of the Statewide Virtual Volunteer Service Fair presentations, or viewing the recorded session later when unable to attend in person, you should report your time to the nearest quarter hour (0.25) increment.

Similarly, when you participate in any of the virtual volunteer opportunities that you signed on for, report your hours to the "TMN Virtual Volunteer Service Fair" opportunity. In the notes element include the title of the opportunity you attended.

The full catalog of Virtual Service Projects will be available on the state program website (https://txmn.tamu.edu).

PLACE-BASED Distanced Service Projects

Place-Based opportunities are chapter based (as opposed to Statewide) opportunities. Chapter approved Place-Based events should already have opportunities at your chapter so that hours may be recorded just as you would any other opportunity. Your chapter VMS admins can approve you for these service opportunities if you are not already approved for them. For opportunities that are out of your chapter's service area, please contact your chapter leadership to obtain approval before you participate.

The Place-Based opportunities have a large element of Place-Based service associated with them that are likely best served by the chapters local to and trained in the ecoregion of these specific locations.

The full catalog of Place-Based Service Projects will be available on the state program website (https://txmn.tamu.edu).

For VMS Admins

The "TMN Virtual Volunteer Service Fair" opportunity has been copied to each chapter folder; **please do not modify this opportunity** other than to approve your volunteers to it and to approve their hours. Volunteers may also sign up on their own using the link provided at the top of this document.

Each Place-Based local opportunity must be set up in the local chapter folder by the chapter VMS admins prior to the date of service(s) just as you would any other opportunity. Your chapter volunteers can then be approved to those opportunities just as you would approve them to any other local opportunity.

You will be able to see and approve hours that your volunteers have recorded when you open their logbooks (use the **Volunteers** tab and NOT the Opportunities tab for hours approval). When recording hours into the Fair opportunity, volunteers should put the event title and the location information into the notes field of the Logbook Entry.

If you want to know if a volunteer is approved for the Virtual Fair: use the Volunteers tab, select the volunteer, select Request/Approve and select All Folders in the top right corner of the window. In the lower right corner of the screen, scroll down the alphabetized listing to see if "TMN Virtual Volunteer Service Fair" is listed.

If you have questions or difficulties with administering the Fair in VMS, please submit a Help Desk ticket at (txmn.org/help).

AT: TMN Tuesday

AT: TMN Tuesday was created by the state TMN program office out of a need to provide advanced training opportunities during the pandemic. Information about upcoming TMN Tuesday presentations can be found on the Texas Master naturalist website at txmn.tamu.edu . The sessions are usually moderated by Mary Pearl Meuth and Michelle Haggerty; at the conclusion of each session, the amount of advanced training time that can be logged is announced.

Each TMN Tuesday session is recorded and, even though there is no opportunity for interaction with the speaker, the recorded sessions may be viewed for advanced training hours if the volunteer was not able to view the live presentation. The 45-day rule is applied from the date the **volunteer viewed the recording**, not from the date of the original presentation.

TMN Tuesday recordings from prior years may be viewed but they may NOT be counted for current year advanced training hours.

TEXAS WATERS SPECIALIST

The "Texas Waters Specialist" group is for use by the administrators of that program, principally, Melissa Alderson; TMN administrators may view the data but should make no changes to it.

Frequently Asked Questions Texas Waters:

- I understand participants sign up for the program through you. Is there a web site or a sign-up form location I can reference?
  If participants are TMN, they ask their VMS coordinator to approve them for the "**AT:TX Waters Certification Training**" opportunity and volunteers enter their AT using this opportunity.
- I understand that you monitor progress of the participants in their work towards achieving the certification. How do you notify them when they have satisfied the certification requirement? Is there a paper certificate or a pin they receive?
  Danielle Knapp-Smith (water education VISTA) will send an email to the VMS coordinator confirming hours of the chapter. She does this on a monthly or bi-monthly basis. Once names and hours are confirmed, she will send certificates, pins, and name tag flags to the chapter address (confirmed in email as well). This way the members can be recognized at their chapter meetings. After July, 2019 that email would come from myself.
- From your website, participants must obtain at least 8 hours of advanced training from trainings approved by you and they must obtain at least 10 hours of service in waters related local chapter approved opportunities that are designated eligible for Texas Waters Specialist.   Is there basic training provided by your office to prospective participants where they learn the how to satisfy the requirements, how to sign up, how to report their hours, and how to obtain the list of approved webinars?
  There is no training set but if your chapter would like Danielle or I to come to a meeting or do a webinar style training (if distance from Austin is too great) we can set that up. Additionally, we host Texas Waters Day before every TMN Annual Meeting. We will offer Texas Waters Day again this year.
- Is the certification a one-time certification or must they re-certify annually by satisfying the 8 advanced training and 10 service hours each calendar year? Must the hours for satisfying the requirements be met within the same calendar year or do hours carry over from one year to the next for achieving the minimum requirements?
  The initial 8 hours is a one-time requirement. Once they receive those 8 initial AT hours, they must have 10 service hours that are aquatic/watershed based. The AT and service hours are not in addition to the TMN hours, they can be used as the same hours but they are just aquatic/watershed focused. Currently there is not a timeframe for obtaining the 8 hours but we would like the 10 hours to be within a year of obtaining the certification to stay certified. If you would like to obtain the 10 hours while getting your 8 hours we are allowing that also.
- How do I contact a Texas Waters Specialist Administrator?
  Contact Melissa Alderson (Melissa.alderson@tpwd.texas.gov)
  Conservation Education Manager, Texas Parks and Wildlife

Please direct more specific questions directly to the Texas Waters Program, Melissa Alderson.

## APPROVING A VOLUNTEER TO OPPORTUNITIES

Once a volunteer/member is set up in VMS, you must manually approve them to Chapter project opportunities in order for them to report their hours. Use this procedure if a new volunteer profile has just been created.

(Note: volunteers must be marked "Active" on the volunteer Personal profile screen in order to be approved for opportunities and only non-expired opportunities may be approved to volunteers):

Select the Volunteers Tab

Ensure that your chapter is selected in the folder manager pane on the left – if it is not highlighted in red, click on your chapter's folder to select it (it will turn red when selected as "CenTex" is in the image below).

In the "Volunteers" tab, select the chapter member (one at a time) you would like to manually approve opportunities by clicking in the box to the left of the volunteer's name.
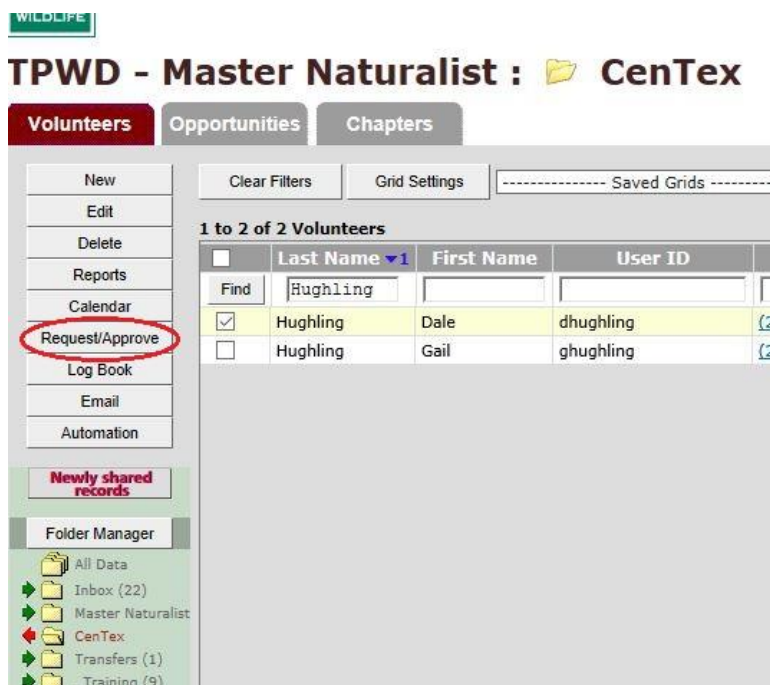
Click on the "**Request/Approve**" button in the left menu boxIn the upper right corner, click on the button labeled "only current folder"; this will select only opportunities from your chapter folder.

To ensure you are working only with <u>current opportunities</u>, from the drop down list in the "Named Searches" box, select "**TMN-Active Opportunities**" (this will filter out opportunities that have expired or are titled as Historical, Apply To Chapter, or Initial Training).

In the "Opportunity Title" window select the chapter opportunities you would like to manually approve for the member by clicking in the box to the left of the opportunity name; you may approve none, one, many, or all opportunities at one time (you may also un-approve members for selected opportunities here).

Select "Approve" (or "Un-approve" to remove an opportunty) by clicking in the appropriate grey box on the right bottom corner of the screen. You may get some error messages as the volunteers are processed; possible causes include (1) the volunteer activity status is not "Active" or (2) the volunteer is already approved for the selected opportunity.

Click on "Finish" to close the dialog box.

APPROVE MANY VOLUNTEERS AT ONCE TO AN OPPORTUNITY

Start in the Opportunities tab to approve several volunteers at once to the same opportunity. <u>Be aware, the volunteer's Activity Status must be "Active" to be approved for opportunities</u>.

1. Ensure your chapter is selected in the Folder Manager and click on the Opportunities tab.

2. Select the opportunity for which you wish to approve volunteers by clicking in the box to the left of its name, then click on "Request/Approve" from the left menu.

3. To ensure you are working only with your current volunteers, use the "Request/Approve Filters" box in the upper right corner. From the Named Searches drop down list, select "TMN-Hours Entry Eligible", then click the "Refresh" button just below the "Request/Approve Filters" box.

Taking these steps ensures you are not approving TMN-Inactive or TMN-Interested volunteers.

4. You may select all the volunteers by clicking in the box to the left of 'Name', or you may select any number of individual volunteers by clicking in the box to the left of their name.

5. In the screen shot above, two volunteers have been selected for approval for the Administrative Opportunity. Click on 'Approve' and then 'Finish' to approve them for this opportunity; you will be returned to the 'Opportunity tab' grid.

Note: If you specified a "Number of Volunteers needed" on the "Logistics" tab of the opportunity, the number will appear at the bottom of the "Opportunity Approval" page. If the "Approved" total is equal to or greater than the "Number of Volunteers Needed", the opportunity will no longer be displayed on the web page.

VOLUNTEER TAB

PROCESS FOR ONBOARDING NEW TRAINEES

New Volunteer Onboarding

Updated 12-29-2022

New Volunteer

Start → Apply to the local chapter using the chapter accepted process (online or paper form) - this is NOT the TPWD online volunteer registration creating the VMS profile

This is NOT the TPWD application

Chapter accepts Volunteer into training class.

Trainee creates a new VMS profile online at txmn.org/apply

These trainees will appear in the VMS Inbox with no TMN status.

Record progress in eRecruiter → Completes training requirements? → Yes → Initial Certification completed by one calendar year from the first class of training for the trainee; if not complete, the Board works with the trainee until it is completed.

Hours-Keeper

Submit VMS Help Desk ticket with New Class List attached.

(List should include Name, Date of Birth, and email address)

Review Class List Status Document → Volunteers has an account? → Yes →

Necessary data for Certification group

- Move Volunteer Profile from inbox folder to Chapter folder.
- Change Class Year, Update Dues year, Update Current Chapter, Assign Opps
- Change TMN Certification Level to TMN-In Training.
- Approve for Chapter Meetings and Initial Training opportunities

Approve volunteers for active opportunities

- Change TMN Certification Level to TMN-Interested
- Unapprove opportunities

Change TMN Certification Level to TMN-Active

VMS Support

- Check New Class List against the TPWD Cross Reference List
- Create Class List Status Document

Share Volunteers from other programs → Respond to Help Desk ticket with Class List Status attached

- Criminal Background Check completed.
- Change Activity Status from Pending to Active

Cheryl runs and updates the CBC/Activity Status

Finish

(image updated December 29, 2023)

TRAINING COORDINATOR PROCEDURES FOR NEW TRAINEES

The purpose of these procedures is to give the chapter training coordinator and membership director a guide to processing new trainees..

New Trainee Registration

Depending on the policy of the chapter, new trainees may make it known to the local chapter they wish to be part of the training class; once vetted by the chapter, the trainee is referred to the on-line TPWD application at txmn.org/apply. Once the trainee is confirmed into the class and has agreed to a background check, the chapter admin should submit the items below to the TMN Help Desk to the VMS Help Desk via a ticket requesting that the trainee be vetted against the TPWD list of volunteers:

- the trainee's full legal name,
- date of birth,
- email address (optional)

The reason for this requirement is to reduce the number of duplicate volunteer profiles introduced into the TPWD system through the Texas Master Naturalist program.

<return to the diagram>

Vetting Against the TPWD Master List of Volunteers

The **TMN VMS Support Team** will check the new trainee against the TPWD Cross Reference list and return the results to the chapter Hours Keeper (usually by the next day). The results will be returned to the chapter as one of the following:

- The results of the TPWD Cross Reference check show the trainee is **already registered**: the TMN VMS Support Team will "share" the trainee's profile with the chapter
- The trainee profile was **not found,** and the Hours Keeper should notify the trainee to go to the TPWD website (txmn.org/apply) and create a profile (this process also creates the VMS volunteer user ID), or
- **Additional information** about the trainee is needed in order to complete the vetting process (be sure to include all requested data items)

<return to the diagram>

Hours Keeper:

A) If the results of the TPWD Cross Reference check show the trainee is already registered, you should be able to find the profile in the Master Naturalist "Inbox" – all VMS Admins now have access to the Inbox. To move the profile from the Inbox, refer to the section in this manual titled "Move a New Volunteer from the Inbox". Go to item "C)" below.

B) If the result of the TPWD Cross Reference check does not produce a match for the new applicant, the volunteer should be directed to the TPWD website where they can apply on-line to become a Texas Master Naturalist trainee at your chapter by using the "Apply to <chapter>" opportunity (refer them to the "VMS Volunteer Guide" on the Help Desk. At a minimum, the potential volunteer will need the following personal information when applying on-line:

- their first and last legal names

- date of birth

- the user ID and password

- agree to waivers and a background check

- email address

- physical address (street, city, and state)

C) Once the applicant has been moved from the Inbox into the chapter folder, a chapter administrator then must:

- complete the volunteer "User Defined" tab, line group "Certifications"
    - update the TMN Certification Status to "TMN-In Training",
    - update the "Current Chapter" to their chapter name;
    - update the "Class Year" to the current year
- Background Check data (use the grid "TMN Standard-criminal Background Check" to view the data: ensure the CBC has been agreed to, the DOB is valid, the street address city of residence is present,
- and approve the trainee at least to your "Initial Training" and "Chapter Meeting" opportunities.

There may be some new trainees who are unable to complete this task on-line. In those cases, it is recommended that a chapter member mentor the new trainee in creating their profile (the mentor can do the data entry with the new trainee sitting with them as they do it), to include completing the waiver information and establishing the user ID and password. The trainee should be instructed as to how to change their password. The mentor must complete all sections of the TPWD application and be sure to "Submit" the application when finished. If the mentor is not the training director or the membership chair, they should notify the training director and/or the membership chair that the trainee's application has been submitted.

<return to the diagram>

Generate Background Check Cards (optional)

Once a new trainee has been accepted into the program, they should have agreed to a Background Check through TPWD. If the background check is done through TPWD, there is no charge to the chapter; the trainee' profile will be updated with the results by TPWD/TMN. A background check status card can then be generated through the VMS system and emailed to the new trainee (see the section "Generating CBC Cards for your Volunteers" in this manual for details). Once the background check has been passed, TMN staff will update the "Activity Status" to "Active" under the "Personal" tab.

If your chapter chooses to use AgriLife for the background checks, the chapter is responsible for entering the results in the VMS. Some AgriLife offices require that the Master Naturalist chapter provide them with proof of the background check results.

TMN background checks can now be completed within a few days if all the required volunteer data is present and there are no returns on the background check. Detailed instructions for generating the CBC cards are included in this document.

<return to the diagram>

Setting the TMN Certifications Status and Approving to Opportunities

Once the background check is completed, the new trainee should be approved to active chapter opportunities deemed appropriate. Since trainees can earn hours towards certification once they have attended at least one class, it is recommended that they be approved to other chapter opportunities (at the minimum, approve the Initial Training, AT: Chapter Meeting, and the Chapter Meeting Non-AT opportunities). Trainees **may not earn hours toward certification prior to attending the first Initial Training class**.

<return to the diagram>

Trainee Entry of Training and Certification Hours

Commencing with calendar year 2016, all trainees should enter their training hours (which DO NOT count towards Master Naturalist certification) into the VMS system. Doing so accomplishes several things:

1) It gets the trainee accustomed to entering hours in the VMS so they are more comfortable with the process when they record service and AT hours

2) It gives chapter administrators and state program administrators quick access to the status of and documentation of the trainees' progress towards completion of class and field training requirements

3) When a trainee completes a training day, they should log in and "Report their Hours" using the "Initial Training" opportunity. Training hours are all entered under the one common opportunity "Initial Training". New trainees should enter their training hours as they would any service hour project or AT event; they use the same opportunity for each session, changing the date, the number of training hours, and the **description of the topic(s)** – indicate in the description the title the topic(s) covered that day, or in the case of a field trip, the location of the field trip site.

4) Should the trainee/volunteer transfer to another chapter, these log book entries will assist in determining what, if any, additional training is needed at the new chapter.

<return to the diagram>

Change of Trainee Status (from TMN-In-Training)

Once the trainee has completed the classroom and field training requirements, their chapter dues have been paid for the calendar year (some chapters roll the dues into the registration fee or they have no dues requirement), and they have completed the initial certification requirements, the trainee status should be changed from "TMN-In Training" to "TMN-Active".

If the trainee completed the training but has not completed Initial Certification within the time specified by the board, they continue to be marked as TMN-In Training and are to remain in the chapter folder.

If the trainee has not completed all initial training classes and the time, including any additional time provided by the board, for completing the training has lapsed (see the "January 2023 Chapter Management and Operating Protocols" document), the trainee's status should be changed from "TMN-In Training" to "TMN-Interested" and they should be "un-approved" for all opportunities. **Do not change the "Activity Status"** on the "Personal" tab. At the option of the chapter, the profile can be moved back to the Inbox or may remain in their chapter folder.

<return to the diagram>

Other Issues

Grids to facilitate training class management: Logbook grid 'TMN Standard-Training Class' – note: be sure to switch between Summary Mode and Detail Mode.

The Hours Keeper will need to work closely with the Training Coordinator, especially concerning makeup classes for the completion of initial training. The Hours Keeper, Training Coordinator, and the mentor should monitor the trainee's progress towards initial certification and communicate frequently with the trainee and the board concerning trainee progress.

CREATE A NEW VOLUNTEER PROFILE ON-LINE

Applicants who are not already registered as a TPWD volunteer may go to http://txmn.org/apply to complete a volunteer profile; this process is discussed in detail in the "TMN Volunteer User's Guide" which can be found on the Help Desk. Volunteers who already have a TPWD user ID may use this section to update their profile.

UPDATE AN EXISTING VOLUNTEER PROFILE

If the volunteer has already completed a profile, they should go to http://txmn.org/hours and enter their assigned user ID and password, click on the "LOGIN" button to access and update their information. Once the volunteer is logged in, click on the item "Edit My Profile" in the lower left corner to update the volunteer profile. Shown below on the left is an image of the volunteer login portal; on the right is an image of the volunteer dashboard.

If the volunteer does not know their user ID and/or password, the chapter administrator can use their "eCoordinator" login to reset the volunteer's password by following the steps shown below:

1. select (in the checkbox) the volunteer who is unable to log in
2. select "Edit" from the left bar menu
3. on the resulting profile display, you should find the volunteer's user ID about halfway down the page and just beneath that will be the "Password" (filled with ***…*)
4. you can reset the password by positioning your insertion point in the "Password" box to the right of the ******; delete the old password, and type in a new password; repeat those steps in the "Password Verify" box being careful to enter exactly the same new password
5. if the volunteer has a new email address, this would be a good time to update that
6. to save the changes, click on "Finish" or on "Apply" in the lower right corner of the display
7. notify the volunteer what the new, temporary password is and instruct them to change it when they get logged in

TPWD VOLUNTEER ACTIVITY STATUS

Unless you have JUST manually entered a volunteer in error, volunteers are never '**Deleted**' from the system; volunteers are shared with all Texas Parks & Wildlife programs; any edits made to a volunteer "Activity Status" are seen by all programs; a volunteer's "Activity Status" should not be changed at the chapter level other than in the event the volunteer is deceased.

- **Active**- A volunteer is currently active. That is, they signed up as a volunteer and are submitting/reporting hours at the rate of at least one hour per year and have paid chapter dues if they are required.

- **Inactive**- A volunteer is signed up as a volunteer for TPWD but has been disapproved by TPWD for volunteer service in its volunteer programs

- **Pending**- A volunteer has applied and has not had their background check completed. The volunteer will be pending until a Criminal Background Check (YPS/CBC) has been completed.

- **Not Eligible**- This status is for volunteers who have been "removed" from an opportunity based upon misconduct or not eligible due to YPS/CBC results. If there are questions surrounding the YPS/CBC results on whether the person can volunteer for any opportunity, contact your Chapter Advisor.

- **Deceased**- In the event of the passing of one of your members, you may change their activity status to "Deceased" but should do so, only after all their hours have been entered. **Note**: you must also change the TMN-Certification status to TMN-Inactive (and we recommend removing the email address).

To change the "Activity Status" for one of your volunteers to "**Deceased"**, select your chapter, select the "Volunteer" tab, select the volunteer whose status is to be changed, and click on "Edit". The Activity Status is in the lower right corner of the view (you may have to scroll down to see it), select "Deceased" from the drop-down list. We also recommend removing the deceased volunteer's email address. Click "Finish" when you are ready to save your changes and return to the data grid. Additionally, you will need to change the deceased volunteer's TMN-Certification status: after you have changed the Activity Status, select the tab "User Defined", from the groups on the left, select "Certifications", in the Master Naturalist Certification Status box, use the down-arrow to select "TMN-Inactive" and click on "Apply" or "Finish".

The Activity Status is changed from Pending to Active by the TPWD staff who run the criminal background check. It should not be set to Active by the chapter.

MOVE A NEW VOLUNTEER FROM THE INBOX

The Inbox should be examined, at the very least, weekly for trainees requesting your chapter. **The "Inbox" is a folder shared by all chapters** and is the "landing folder" for TPWD shared volunteers as well as new TMN applicants; be careful about editing or moving these profiles by ensuring the one you are working on belongs to your chapter.   To check the Inbox for your volunteers, follow these steps:

Log in, ensure your tab is set to "Volunteers", then select the grid named "TMN-Standard Inbox" (**Inbox** should then be highlighted in red in the Folder Manager column). You should now be able to see the "Requested To Chapter" and the "Current Chapter" columns. The resulting view should have the column heading as shown below:

Last Name ·	First Name	Home Phone	Cell Phone	Email Address	City	Activity Status	Master Natu	Current Chap	Requested To (
						⌄	⌄		
		(903) 431-	...@gmail.com			Pending			

Your chapter name will appear in either the "Requested To Chapter" column or the "Current Chapter" column depending on how the trainee registered. If the volunteer was "shared" from TPWD, you will have to scan the list for the volunteer's name as their TMN-status has not been set yet. Once you determine that one of the volunteers shown in the Inbox belong to your chapter, place a check in the box to the left of their name and follow the instructions below:

- Click in the box to the left of the name you want to copy; a **red** arrow should appear next to the Inbox; if a **red** arrow also appears next to any other folder, it is an alert that this person has already been picked up by that chapter

- Click on the **green** arrow next to your chapter's name (copies the profile to your folder); if the arrow next to your chapter name is already red, this means the profile is already in your folder

- **Click again on the <u>red</u> arrow next to the Inbox (this removes the profile from the Inbox and causes the <u>red</u> arrow next to the Inbox to turn <u>green</u>)**

Once the profile is copied into your folder, you should:
- use the **Edit** menu item to examine the profile to ensure it is complete
- on the "User Defined" tab and under "Certifications", update the TMN certification status to "TMN-In Training" or "TMN-Interested" as appropriate, update the "Current Chapter" to your chapter name, update the "Class year" to the current year once they are officially in

- Approve the potential trainee to
    - The "AT: Chapter Meeting" opportunity
    - The "Initial Training" opportunity
- Do not update the TPWD Activity Status; this will be updated once the CBC is completed

A common problem in finding potential trainees in your chapter folder is when their TMN-Certification Status has not been set or it is a value not included in your search criteria; in those cases, you will need to scan the names for the volunteer you are looking for.

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RESETTING VOLUNTEER PASSWORDS

It is encouraged that you instruct the member/volunteer to reset their own password. If that fails, follow the instructions below to help them get the password reset.

Volunteer Passwords:

1. A member may change their password by logging in on the volunteer portal at:

   http://txmn.org/hours/

   Once logged in, from the Dashboard, they should click on the "Edit my profile" link in the bottom left of the screen.
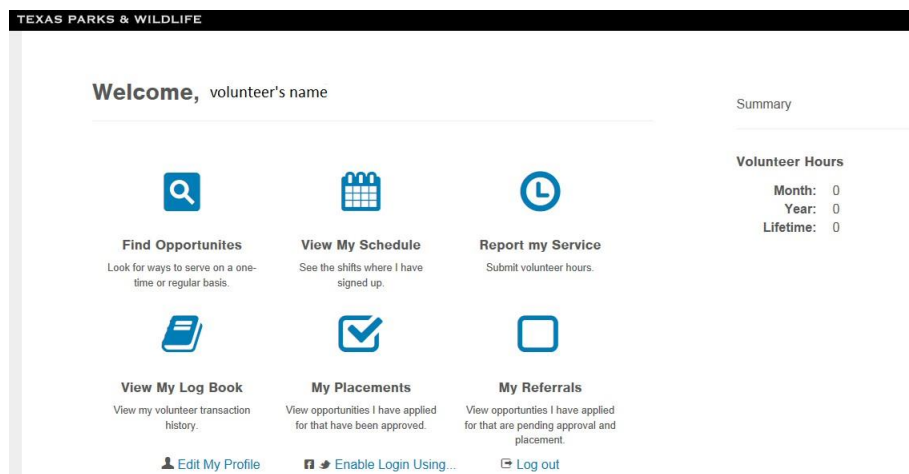
Click "Continue" on the resulting pages until the Personal Information page is displayed; here they can enter a new   password (passwords are case-sensitive, have a minimum length of 8 characters, and must contain at least one numeral).

a.

When finished editing your profile, click on "Save".

If the volunteer has forgotten their password, they can connect to the VMS volunteer login site and click on "Forgot your password" to have a temporary password emailed to them. If that fails, the volunteer should contact the chapter administrator who can reset their password and email the new password to the volunteer.

CRIMINAL BACKGROUND CHECK (CBC)

Texas Parks and Wildlife Volunteers (of which Texas Master Naturalist is included) are "required to have a criminal background check (CBC) when working on any TMN approved opportunity"; reference Article 4.2, page 10 of the "**Chapter Management and Operating Protocols**" document on the Texas Master Naturalist website – txmn.tamu.edu . Texas Parks and Wildlife Department will run background checks for the chapter if the individual candidate has agreed to a CBC and specific personal information, as identified on the next page, has been entered into the candidate's VMS profile.

Texas Parks and Wildlife will run background checks given the following conditions:

- A signed profile waiver and a valid birthdate to run the CBC.

- You are strongly urged to use an onboarding process that has the trainee put in their own profile through the chapter 'Apply To' opportunity).

- Background checks are only run on those with a TMN-status of 'TMN-Active' and 'TMN-In Training'

- If the name & birthdate produce a 'hit', then we send them to TPWD HR where they run it through a different process, and 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 and the name of the TPWD staff conducting the check is entered.

- TPWD CBCs are good for 1 year (at no cost to the volunteer). TPWD does not currently accept other agency or group background checks (like concealed hand-gun licenses or school districts/colleges)

- We run about 500 background checks a month, usually twice a month, more if there are a lot of classes starting up.

- Trainees may begin volunteering with the chapter 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**.

IMPORTANT NOTE: Background checks are automatically renewed by TPWD so long as the volunteer has the required data elements. Volunteers who do not agree to a background check should not be permitted to work on any TMN opportunity. Volunteers may update their CBC required data by logging in as they would to post hours and editing their profile (select "Edit My Profile" at the bottom of the dashboard). If you have any questions regarding the CBC process, contact your Chapter's TPWD Advisor(s). If you have questions about TPWD CBC policy, please refer to the "Chapter Management and Operating Procedures"

To check for CBC's that are about to expire:

Log in to your administrator user ID and select the Volunteer tab

1. Ensure that your chapter is highlighted in red

2. Change the grid settings to "TMN Standard - Criminal Background Check" (from the drop down list)

3. Scan the entries in the column "CBC Expiration Date" for dates that are missing or are approaching their expiration date

4. Verify that your volunteers CBC Result column indicates they "Passed"

When the results of the CBC are returned, the results will be entered in the Volunteers CBC screen. Those results will then be viewable using the "TMN Standard- Criminal Background Check" grid as shown below.

The minimum elements required to run a CBC are:

Consent to a background check (checked "Yes") Legal First and Last Name (versus nicknames) Date Electronically Signed
Physical Address

Date of Birth

There is no charge to the chapter for TPWD to run the background check. A few chapters currently rely on AgriLife to run their background checks for a fee. You should verify with your AgriLife representative that they will accept the results of the TPWD background check and, if you plan to use the background check card that can be generated through the VMS.

- There is no formal communication of the background check results directly to AgriLife other than through using the CBC grid to report the results to AgriLife and providing them with the report, or by showing the background check card, or by giving AgriLife advisors direct access to the CBC grid (recall there is only one CBC admin access)

- You may generate background check results cards through the VMS system. For instructions on how to generate these cards, which are automatically emailed to the volunteer, please see the next section in this document.

Your Chapter's Name
Volunteer's name

The above individual has met the requirements to serve as a Texas Master Naturalist

Criminal Background Check Status: **Pass**
Criminal Background Check Expiration Date: **04/01/2017**
Criminal Background Check Authorized by: **Texas Parks and Wildlife**

TEXAS MASTER NATURALISTS
TEXAS PARKS AND WILDLIFE / TEXAS AGRILIFE
4200 Smith School Road, Austin, TX 78744
TXMN@tpwd.texas.gov - www.txmn.org

GENERATING BACKGROUND CHECK CARDS FOR YOUR VOLUNTEERS

The Texas Parks & Wildlife HR department will automatically process a yearly background check on all volunteers who agreed to the check, have entered their driver's license number (preferred but not mandatory), birthdate, and have an expired background check. Volunteers can update their information in the dashboard through the Edit Profile option. Chapters using AgriLife for the background check are responsible for entering the results in the VMS system.

It is the responsibility of the Chapter to generate or to email the background check card image should they plan to use it. The VMS chapter administrator must make sure that the CBC data is correct and current. The following fields must be completed:

- Volunteer "User Defined" Tab: "Background and Driver Check" group
    - CBC Authorized (by the volunteer)
    - Pass/Fail (by TPWD HR Department)
    - Legal Name as it would be signed (by the volunteer)
    - Date Electronically Signed (by the volunteer)
    - Date of Birth
    - Physical Address (click Yes if it is the same as the mailing address, otherwise, enter your address)
    - Driver's License Number
    - Driver's License State
    - Physical Address County
- Volunteer "User Defined" Tab: "Certifications" group
    - Current Chapter

A 'TMN Standard – Background Check Card' email template has been created to help you create your own chapter card.

Before modifying the background check card template, you must check/modify some of your "eCoordinator" settings.

1) Login in to "eCoordinator" and select "Tools" from the top menu bar.
2) From the Drop-down, select "Preferences".
   a. Enable "Color and Graphics (HTML)" by clicking in the radio button
   b. Enable "Advanced HTML formatting toolbar" by clicking the checkbox
   c. Click on "OK" at the bottom of the dialog box
   d.

Steps to create and test your custom chapter background check card:

1) In the volunteer tab, **select a volunteer with whom you can test the card (possibly yourself)**. If you don't it will send your test cards out to everyone!

2) **Select the email menu button**.   [Email]

3) **Select 'TMN Standard – Background Check Card' template** in the Saved Email Template List and then click on "Open".

4) **Save the template for your own chapter**.

   Replace 'TMN Standard' with your chapter name and add '– Background Check Card' and click on "Save"

   *Be sure that the 'Make this template available to other users of this account' is **not** checked.*

5) Once you have your own chapter template, you can **modify it for your use**. Change the following fields (see the image below):

   - Reply To: = your email address

   - Sender Name: = your name, position

   - Sender Organization: = your chapter name

   - Signature block (at the bottom of the form): Add your name, phone number & email address.

You can Preview the template while you are working on it. Once you've completed your changes, save the template and send to your selected person as a test. The email, if sent through the eCoordinator system, will come from 'system@ecemail.samaritan.com'. Your volunteers may have to mark this account to keep it from going into their spam folders. If you put your email in the cc: field and send the email to multiple users, you will only be cc'd on the first email that goes out.

6) If the test email(s) are satisfactory. You can send the card to multiple volunteers simultaneously by selecting them.

⚠ Warning: If you do not select any users, the email will go to everyone in the grid.

Use the grid column and search system filters to be sure you are working with the most relevant group of volunteers (for example, you probably will not want to send cards to those volunteers who are TMN-Inactive or TMN-Interested.

7) **You are encouraged to NOT change the body of the card** itself as this format and wording has been approved by TPWD and the State Program Office.

EMAILING VOLUNTEERS

The email function can be utilized to communicate with groups of volunteers/Master Naturalist members. For example, one may send an email to all members reminding them to report their service for the month or provide them with information on the chapter's upcoming monthly meeting. Log in using your administrator user ID and password and set your folder to your chapter:

VMS eMail does not keep a record of emails sent; if you need this function, include either yourself or a chapter specific email address to copy.

1. From the "Volunteers" tab, determine what group of volunteers/members you want to email (you might want to set up Named Searches for various groups in your chapter).

2. Select the volunteer records in the grid by placing a check mark in the box to the left of their name. (There is an option to select all records or unselect all checked by clicking in the box above the name check boxes.)

3. Click the "Email" button in the menu.

5. The email window appears as above.

6. Notice that the system defaults to the radio button that indicates how many records were selected. You can also select the other radio button to select all records that appeared in your grid search.

7. The email address of the sender should appear automatically in the "From" field.

8. Enter the "Subject" of the email and the message as you would ordinarily.

9. If necessary, you can insert mail merge fields by clicking on the down arrow for a list to select from.

10. If necessary, you can send "Attachments" by clicking on the "Browse" button. Once the document is selected you click the "Open" button and then "Attach File".

11. If this is a routine email you want to send periodically, enter the name of the email in the "Save Email Template" field. Click on "Save".

DECEASED VOLUNTEER PROFILE UPDATE

When you are made aware that a current or former volunteer with your chapter is now deceased, there are several updates that need to be made in the volunteer's profile:

- Do not delete the profile
- Edit the profile and on the "Personal" tab
    - update the Activity Status to "Deceased"
    - remove the email address(es)
    - possibly remove the telephone numbers
- On the User Defined tab
    - Update the TMN Certification Status to "TMN-Inactive"
    - Possibly enter a note in the Certifications Comments dialog box
    - In the Officers/Committees group, check to see if any entries are selected, if there are, deselect them
    - If the volunteer was a VMS Admin, please submit a Help desk ticket so we may inactivate the admin login credentials
- Remove all approved opportunities
- Approve/Disapprove any logbook entries that are "Not Yet Approved"
- Notify the State Program Office (optional)

THINGS TO DO FOR NEWLY REGISTERED VOLUNTEERS

When a volunteer/member successfully registers using the TPWD website and the "Apply To" search words, they will appear in either the "Inbox" or your chapter folder depending on how they signed up, and their Activity Status is likely "Pending" and their TMN-Certification Status is either "TMN-Interested" or "TMN-In Training". To run the CBC, the TMN-Certification Status for **trainees** must be "TMN-In Training". The Hours Keeper must review the data entered:

- Personal data is complete (DOB, email address, physical address, user ID))

- Background check data (agreed to, electronic signature and date of birth)

- User Defined tab, Certifications group (TMN certification status set to TMN-In Training, chapter identifying information, class designation)

Texas Master Naturalist now initiates the background check for its members; this results in a much faster turnaround on getting background checks run for new members and keeping the checks up to date for existing members. Administrators are requested to NOT contact TPWD to run "special cases" for background checks as everyone's background check is important; doing so only serves to delay the process for everyone. If you feel that volunteers in your chapter have been missed in the CBC process, please contact the TMN Help Desk (txmn.org/help) for assistance in resolving the issue. TPWD does not currently charge the chapters for running and maintaining the CBC's, but they do require that certain data elements be completed:

- Volunteer's agreement to the background check

- Legal first name and last name (middle name/initial is helpful)

- Date of birth

- Physical address (street, city, state)

TMN support staff will change the TPWD Activity Status to "Active" for volunteers who successfully pass the CBC (chapter administrators should not change the Activity Status on the "Personal" tab except in the case of a volunteer who is deceased).

To edit or verify personal data entered by the volunteer:

1. From the Volunteer tab, select the volunteer by clicking in the box next to their name.

2. Click "Edit" from the left pane menu.

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TRANSFERRING A VOLUNTEER BETWEEN CHAPTERS

Reference Article III-C in the Chapter Management and Operating Protocols Handbook (below):

C. Member Transfer

"When a member moves to a different part of the state or wishes to become active in a differeent Chapter, that member may join the nearest Chapter of choice. The transfer can be completed under the following conditions:

- The transferee has a complete VMS profile to include a current, passed CBC.
- The transferee's log book is up to date (to include Initial Training entries – since 2016)
- All the transferee's hours have been approved or disapproved.
- The transferee is current in dues if they are required by the losing chapter.
- The transferee's Chapter Trained In, Chapter Certified In, and Current Chapter have been updated.

Definitions:
- Losing chapter: the chapter the TMN member is transferring **from**
- Receiving chapter: the chapter the TMN member is transferring **to**

Transfer steps:

1. Either the volunteer, the receiving chapter admin or the losing chapter admin will create a help desk ticket at txmn.org/help requesting that a transfer for the member whose information follows:
   a. Transferee's full name and DOB
   b. The chapter names (transfer to chapter and transfer from chapter names)
2. The TMN VMS team will:
   a. Contact the losing chapter if any of the items in the conditions above are not met.
   b. Un-approve the transferee to all chapter opportunities.
   c. Enter a comment on the Certifications tab as the transfer essential data.
   d. Move the volunteer profile into the "Transfers" folder, into the receiving chapter folder, and out of the losing chapter folder.
   e. Create the necessary non-opportunity survey logbook entries using the following scenarios where the letters A, B, C, D represent chapter names and the arrow indicate direction of transfer (read the arrow as "transfers to":
      i. A → B
         1. Create a non-opportunity survey (NOS) for ordinary LBEs in A
      ii. A → B → C
         1. Create a NOS for ordinary LBEs in B only (do not modify NOS for A)
      iii. A → B → A
         1. Delete the existing NOS for A and create a NOS for ordinary LBEs in B
      iv. A → B → C → B
         1. Delete the pre-existing NOS for B and create a NOS for ordinary LBEs in C, leave the NOS for A
   f. Approve the non-opportunity survey logbook entries just created.
   g. Notify via email both losing and receiving chapters as well as the volunteer when these actions have been completed.
   h. Update and close the help desk ticket.

3. Important note: the "Statewide" folder is available to all chapter VMS administrators; as a result, VMS administrators are currently able to see Statewide logbook entries for such opportunities as "AT: TMN Tuesday" and "TMN Virtual Volunteer Service Fair". This is true regardless of the chapter under which those hours were logged so long as the volunteer profile is in their respective folder. For this reason, hours the volunteer has logged under Statewide opportunities are NOT included in the transfer hours; doing so would duplicate the hours.

4. The receiving chapter will need to take the following steps:
   a. Edit the transferee's profile, changing the chapter name information on the "Certifications" group of the User Defined tab.
   b. View any notes the losing chapter may have written into the profile.
   c. Check the transferee's certification status and progress.
   d. Approve the volunteer to appropriate chapter opportunities.
   e. Contact the transferee concerning how to get involved with the chapter, meeting information, points of contact and welcome them to their new chapter.

Important: Service hours, AT hours, and Initial Training hours always stay with the opportunity in which they were earned; that is, the hours stay with the TMN chapter in which they were earned, but certification and milestone "credit" for those hours may be transferred if the volunteer transfers to another TMN chapter. Hours credit that is "transferred in" to your chapter will be entered by the VMS Support Team using the **"non-opportunity" survey**; doing so prevents hours "transferred in" from counting in the chapter total but makes "credit" for those hours available for milestones, certifications, and re-certifications. Using the "non-opportunity" survey will, also, prevent the hours from being doubled in the volunteer's view of their logbook. Hours for Statewide opportunities are NOT included in the transfer hours because they are visible to all chapter admins.

UPDATE OFFICERS AND COMMITTEES

In January of each year, new chapter officers and committee members should be updated in the VMS. The state program office retrieves officer and committee information in February for the Annual Report. As you update new officers and committee members, do not forget to remove/change the designation on those who are leaving office.

To update chapter officers and committee members (marking new ones and removing those leaving office):

1. Select your chapter folder.
2. Select the volunteer to be assigned or the one leaving office.
3. From the left menu, select "Edit".
4. Select the "User Defined" tab and from the list of groups, select "TMN Officers/Committees".
5. For officers and VMS Admins, click the radio button to either set or unset the position.
6. For committee members, enter the name of the committee in the "Committee member Info" box.
7. Click on "Finish" to go to the next officer/committee assignment.

DISCIPLINING/DISMISSING A CHAPTER MEMBER

It is important to review the founding principles of the Texas Master Naturalist Program before addressing inappropriate behavior. The Mission statement and the Texas Master Naturalist Chapter Management and Operations Protocols contain the primary tenets of the program." All policies and procedures outlined in the "Chapter By-Laws – Article IV" and the "Chapter Management Guidelines – Policies and Procedures for Disciplining and/or Removal of a Member" should be followed. The steps below should be employed to effect and document the disciplinary action and/or the removal of the chapter member in the VMS.

Once the action concerning the member has been approved, update the volunteer's record in the VMS as follows:

Disciplinary action: depending on the situation, it is possible that no action need be taken in the VMS. In those case where actions and steps need to be documented, the volunteer's profile can be edited with a note made in the History tab; additionally, if needed, a supporting document can be uploaded through the Attachments tab (only one document can be uploaded).

Removal of the member: in those extreme cases where the member is to be removed from the chapter, edit the volunteer's profile as below:

- Do NOT change the volunteer's TPWD Activity Status on the Personal page of the volunteer's profile.

- Change the TMN Certification Level (on the Certifications line item) to TMN-Inactive or TMN-Ineligible depending on the circumstances.

- Add a comment in their Certification Comments indicating the volunteer was dropped from the chapter membership; this information is accessible to any current chapter admin.

- Add enough supporting documentation in the History tab to alert a new chapter there were issues that could not be satisfactorily resolved, and that additional details can be obtained by contacting the then chapter President, the sponsor, or the State TMN Program Manager

- Un-approve the volunteer from all opportunities – this prevents the volunteer from posting hours in the TMN program but does not preclude them from participating in other TPWD volunteer programs

- Remove but do not Delete the profile from your chapter folder (See the section "Remove a Volunteer from Your Chapter Folder").

REMOVE A VOLUNTEER FROM YOUR CHAPTER FOLDER

Do NOT "delete" a volunteer profile; if you accidently delete a volunteer, please contact the VMS Support Team via the Help Desk (https://txmn.org/help) , and we can help you restore the volunteer's profile.

The steps below are for removing a volunteer profile from your chapter folder either for disciplinary purposes, at their request, or upon their passing. DO NOT use the steps below to transfer a volunteer to another TMN chapter. See the section in this manual regarding "Transferring a Volunteer Between Chapters" for transfers. Should you find it necessary to remove a volunteer from your chapter folder, you may do so using the following procedure.

- Ensure there are no un-approved logbook entries for the volunteer profile you are about to remove.

- Ensure there are no opportunities (including Statewide opportunities) approved for the volunteer profile you are about to remove.

- In your chapter folder, click on the "Volunteers" tab and select the volunteer to be removed from your list.

- Your chapter folder name will have a red arrow next to it; click on the green arrow next to the Inbox, then click on the red arrow next to your chapter folder. This action, done in the sequence described, moves the profile to the Inbox and removes the volunteer from your chapter folder but does NOT delete them from the system. **Volunteers should not be deleted**.

Note: Removing (not deleting) a volunteer from your chapter folder will leave any logged hours that volunteer posted as being attributed to your chapter as the hours are associated with the opportunity rather than with the volunteer.

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CREATING VOLUNTEER PROFILES

After obtaining the prospective volunteer's registration information, the next thing is to request a cross-reference with the master list of TPWD volunteers (submit a ticket on the Help Desk asking for a cross reference for <volunteer name>, <date of birth>, and <your chapter name>. This is necessary to ensure the volunteer does not already have a TPWD profile. The trainee profile should be created before the trainee attends a training class.

Volunteers should set up their own profile (if they do not already have one) by navigating to "txmn.org/apply" and enter "Apply" in the Search keyword box. Additional information about this can be found in the appendix section "Create a New Volunteer Profile On-Line".

An alternative workforce waiver form, criminal background check form, and media release must be completed by the volunteer (not the administrator) on-line.

In unusual circumstances, a mentor, chapter officer, or trainee mentor can sit alongside the trainee and either walk them through the steps or do the steps as the trainee watches.

1. Click "New" in the left menu box to display the new volunteer profile screen. Enter the volunteer's/member's contact information from their volunteer application.

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AUTOMATIONS

Automations is a menu item that can provide a way to update many records at one time; they may be run either on volunteers or on opportunities. If you need an automation that is not in the list, please submit a Help Desk ticket with as much information as possible about what your requirement is.

1. Be certain to **select your chapter folder** before running automations, then select the "Volunteers" tab or the "Opportunities" tab depending on which you need to work. Although both work the same way, for this documentation, we will work in the Volunteers tab.
2. Select the set of volunteers to be included in the automations update run (this example selects 2 volunteers). This selection can be done by checking the box to the left of their name or by using a Filter or Grid setting (i.e. TMN Standard Hours Entry Eligible).
3. Select "**Automation**" from the left sidebar menu; choose "**Only Selected Volunteers**".
4. Scroll down the list of available automations until you find the one you need; if you do not see what you are looking for, submit a Help Desk ticket describing what is needed. **NOTE: Some automations in the list are specific to a particular chapter**.
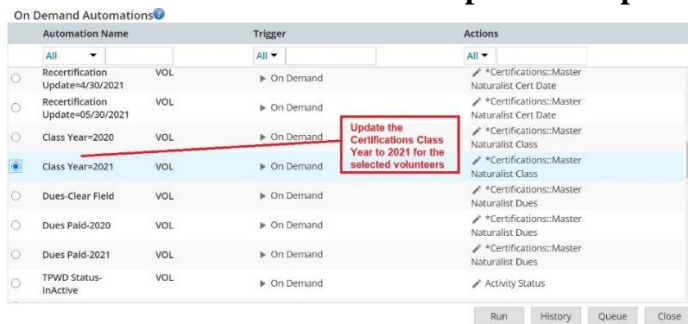
   When you find the automation that fits your needs, select it (click in the selection circle to the left of the automation name) and click on "**Run**" at the bottom of the screen shown above.
5. You will get a confirmation screen as pictured below; if it appears correct, click on **OK**. If it is not correct (number of records is incorrect), now is the time to click on "**Cancel**".
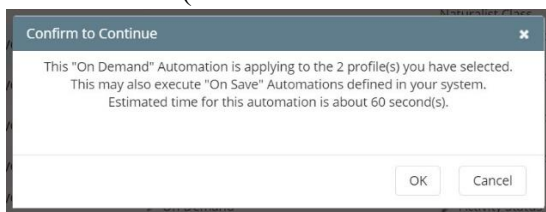
6. You may either watch, by using **Refresh,** the progress or click on **Close** to close the dialog box – closing at this point does NOT interrupt the automation progress.

"Edit" A RECORD

VMS records can be updated using the "Edit" button from the left menu palette in "eCoordinator". Using the "Edit" function, you may change or view any of the contents of a volunteer, opportunity, or chapter record. To use the "Edit" function, select the tab to work in,

select the record within that tab to be edited by clicking to the left of the name and then click on "Edit" or, more simply, double click anywhere in the record line you wish to edit

Log Books

MONITORING AND APPROVING VOLUNTEER HOURS

Once a volunteer has worked/attended an opportunity and submitted their hours, the Hours Administrator must now approve or disapprove those hours. Hours can be approved for a single volunteer or for multiple volunteers at once depending on how many volunteers are selected. To approve volunteer hours:

- be sure your chapter folder is selected and select the "Volunteers" tab

- Select the volunteer(s) for whom you wish to approve hours (you may select all)

- Click on the left menu item "Logbook" and click "Only Selected Volunteers" (if you want to see logbook entries for everyone, click on "All Volunteers in Grid").

The volunteer's logbook should display as shown below sorted by name; you may find it useful to also sort by Start Date by clicking on the column heading "Start Date":

Ensure: the **date range** is set for the desired time frame, "**Details Mode**" is set, and the grid is set to "**TMN Standard**" and filter to "**- TMN Vol Hours No Yet Approved".** If they are not, use the drop- downs to change the values. You might need to expand the screen viewing area by dragging the right column title margin to the right to see all of the columns shown above.

Select the logbook entries you wish to approve by clicking in the box to the left of the entry. Then, click on "Approval" in the left menu pane. On the approval screen, click on "Yes Approved", and enter your comments in the comment text box.

REPORTING FIELD RESEARCH HOURS

Field Research service projects must be set up in eCoordinator with the "Field Research" survey in order to accommodate the lumping of multiple days of research/reporting into one logbook entry. Field Research is the ONLY category in which TMN volunteers may lump days together in a single logbook entry. The 45-day rule still applies for Field Research entries and is based on the start date for the entry.

The Field Research survey contains both a start and an end date whereas surveys for other opportunity categories contain only a "Date" (of service):

- The volunteer should log in using "eRecruiter" and from their drop-down box select the appropriate opportunity (for example CoCoRaHS – Community Collaborative Rain Hail Snow)

- The survey defaults to the Field Research survey.

-
- Enter the start date for this collection report (the first day for this report of hours)

- Enter the ending date for this collection report (the last day for this report of hours)

- Enter the total number of hours (including any travel time) for the date range above

- Enter a brief description of the activity (perhaps including the location)

- (Optional) enter the total number of miles driven for this service project during the reporting date range

- Click on OK

For CoCoRaHS entries, the maximum number of hours per month that may be entered is left to local chapter guidelines. The options most widely used are (a) 5 minutes per day or 2.5 hours per month, (b) 15 minutes per day or 7.5 hours per month, or (c) 4.0 hours per month. Since situations vary so greatly across the State as to how long it may take a volunteer to check their gauge(s) and do then do the reporting, the decision as to the maximum number of hours is best determined by the chapter when considering the distance volunteers may need to travel to check gauges.

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CREATE A LOGBOOK ENTRY USING "eCoordinator"

Although you should strongly encourage your volunteers to post their own logbook entries, the administrator, you can, under unusual circumstances, create logbook entries (post hours) for volunteers.

To post a log book entry for a volunteer:

1. Select the Volunteer tab and ensure you have selected your chapter's folder.

2. Ensure the volunteer is approved for the opportunity (use the Approval item from the menu)

3. Select "LogBook" from the menu..

4. Select "Only Selected Volunteers" from the drop-down menu (inconveniently located).

5. Click on "New" in the menu pane.

6. Select the opportunity for which you need to post hours from the list (if you do not see the opportunity listed, it would be because the volunteer is not yet approved for that opportunity).

7. Click on the Survey name in the center dialog box and click OK at the bottom; complete the survey paying attention to the type of hours selected and the date; click on "OK" at the bottom of the survey.

8. Close the volunteer's logbook by clicking on "Close" from the left-hand menu bar.

9. The logbook entry is posted but now must be approved.

CORRECTING A LOGBOOK ENTRY FOR A VOLUNTEER

Although the volunteer is able to correct their own errors in their log book before it is approved, the VMS chapter admin can also make corrections for them. After the hours have been approved, only the administrator may make changes to the entry.

To correct a logbook entry in eCoordinator:

2. Set the tab to Volunteers and select the volunteer with the error in their logbook.

3. Click on "LogBook" in the menu pane, select "Only Selected Volunteers" from the menu.

4. Set the mode to "Details Mode" (at the top of the page) .

5. Set the necessary date range in the dialog box in the top left, then click on "Apply".

6. Select the entry to be corrected (click in the box to the left of it).

7. Click on "Edit" in the menu pane.

8. Make the correction(s) and click on "OK" at the bottom of the page.

9. Close the logbook.

To make changes, click in the grid box you wish to change and overwrite the contents with the new value. You may advance from one to tab to the next by clicking on the destination tab; this action will save any changes made on the previous tab. Clicking on "Apply" will save any changes and leave you on this page. When you have made all the changes needed, click on "Finish"; that will save your changes and return you to the data grid.

OVER-RIDE 45 DAY LOG BOOK ENTRY RESTRICTION

Texas Parks and Wildlife has agreed to allow one chapter VMS administrator to have the ability to override the 45-day restriction imposed on logbook entries (hours). The restriction was initially imposed to satisfy federal grant auditors, but the needs of Texas Master Naturalist chapters occasionally require the ability to override this restriction. The role name that is associated with the override ability is Role 45 (or VMS LBE); when requesting your chapter administrator be given the 45-day override, please use the following guidelines (only the Chapter President can request this designation):

- Ensure that a chapter administrator does not already the role assigned to them (each chapter can only have one administrator assigned the role at one time.
- Ensure the administrator to be assigned the role has been previously trained by the TMN VMS Team as a VMS Administrator.
- Request that your Chapter President submit a Help Desk ticket to "Assign the Role 45 to <name of the administrator> for <name of chapter>".
- The named administrator and the Chapter President will be notified via email when the role has been assigned (usually within one day of the receipt of the authorization).
- Chapters are not required to name a VMS administrator to have the Role 45 (override).

There are some stipulations imposed on the use of the 45-day override role:

- The TMN VMS Team is charged with monitoring, through the annual audit, the use of the override for compliance.
- Use of the 45-day override should only be used to create new logbook entries that are older than 45 days; the frequency of use should be rare and only with the approval of or at the direction of the chapter Board of Directors.
    - o Use of the 45-day override is for the VMS administrator to make correction of logbook entries that were entered on time but had incorrect data or incorrect opportunity selected and for approving those hours.
    - o Use of the 45-day override is for the administrator to enter new logbook entries for members when there are extreme extenuating circumstances that prevented the member from completing the entries within the 45-day period following the event (that circumstance should be documented in the approval notes)
    - o Use of the 45-day override is NOT to accommodate any members who:
        - ▪ forgot to make the entry
        - ▪ had technical issues that were not made known to the chapter leadership
        - ▪ was on vacation
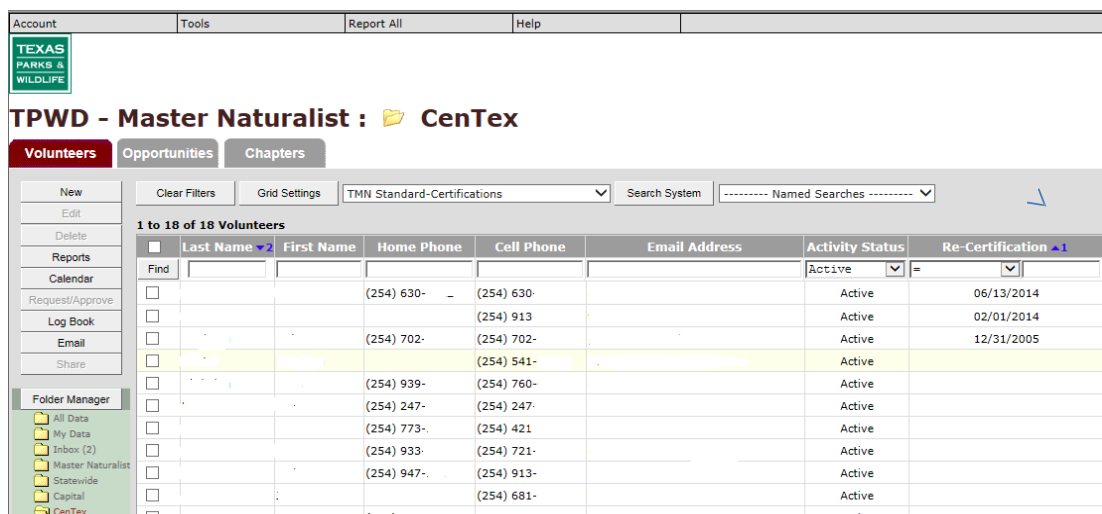   - ▪ or, otherwise, just did not get around to it in time

RECOGNITION/CERTIFICATION

In the VMS, program administrators can keep track of volunteer recognition (milestones), certification, and recertification based upon a volunteer's hours. For the Texas Master Naturalist Program these increments include 250, 500, 1000, 2500, 4000, 5000, 10,000 and 20,000 hours of service. Before beginning these procedures, ensure you are up to date on hours approved.

Find Your Volunteers Who Have Not Recertified for the Year

Open your volunteer list (the Volunteers tab) and set the grid to "TMN Standard – Certifications"; set the 'Filters' to 'Hours Entry Eligible'.

From the left menu, select "Log Book" – "All Volnteers in Grid", change the Grid to "TMN Standard-Awards & Recertification":

Re-certifications: Set the Start and End Date for the current calendar year, change to "Summary Mode" and Summarize by: "Volunteer Name" and click on "Apply". Click on the column heading 'TMN Hours' to sort the list by volunteer service hours. Scan the report for volunteers who have reached the recertification goals (40/8). Once they have been recertified, do not forget to update each newly recertified volunteer's profile with their recertification date for the current year (next page).

Initial Certifications: trainees have twelve -12- months from the start date of their Initial Training Course to complete their initial certification requirements. To determine initial certifications, follow the steps above but change the start date to the start date of the trainee's initial training course.

To update a volunteer's certification record:

1. Select the "Volunteer" tab.

2. Select a volunteer in the grid and click Edit in the menu.

3. Click the "User Defined" tab.

4. Click on "Certifications" in the group list.

5. Complete the appropriate elements:

   After feedback from the Annual Meeting, we've added fields for you to keep track of the last date that dues were paid and the class year of the volunteer. You can find the fields on the "Certifications" screen.

   When newly trained volunteers reach 40 hours of Service and 8 hours of AT, they become initially certified and you may use the "TMN Recognition" screen to update the date..

   Very active volunteers can become initially certified and recertified during the same calendar year if the trainee volunteer obtains at least 80 service hours and 16 AT hours during the same calendar year. You can update the recertification field on the "Certifications" screen. The Initial Certification element has been added to the TMN Standard Awards & Recertification Grid.

Find Your Volunteers Who Have Reached a Milestone

Open your volunteer list (the Volunteers tab) and set the grid to "TMN Standard – Recognition" set 'Filters' to 'Hours Entry Eligible'; click on Log Book in the left menu pane, select "All volunteers in the grid" and change the grid to "TMN Standard-Awards & Recertification". Change the date range so that it spans January 1, 1997 to the current date; change to "Summary Mode" and Summarize by "Volunteer Name", then click on "Apply" if necessary.

This is a report of currently approved hours for each volunteer, their certification and recertification dates, as well as their milestone dates. You may use this report to identify those volunteers in your chapter who have reached a milestone but it has not yet been awarded. Once awarded, it is important that the volunteer's milestone record be updated as follows:

To update a volunteer's milestone record:

1. Select the "Volunteer" tab.

2. Select a volunteer in the grid and click Edit in the menu.

3. Click the "User Defined" tab.

4. Click "TMN Recognition" in the group list.

5. Complete the appropriate elements for the milestones reached.

5. Complete the elements appropriate for the particular milestone:
    a. For the "xxx Hours Awarded", select from the drop down list "Yes" or "No".
    b. For the "xxx Hours Date" field, enter the date the volunteer received the recognition.
8. Click "Finish" at the bottom of the page.

Milestones and Not Yet Certified Volunteers

The recipients of milestones must be a volunteer who has completed their initial training and may or may not have yet certified. To be specific, to be eligible for a milestone award, the volunteer must:

- Have completed the Texas Master Naturalist Initial Training Course
- Have agreed to and passed the TPWD CBC
- Have obtained the necessary approved volunteer service hours for the award
- Have paid dues if any are required
- May or may not have initially certified

12. Under "Send Using": select if you want to use "eCoordinator" or the default email client on your computer.

   Note: When using the "eCoordinator" for email, messages **may** get sent to the person's junk (or spam) mail.

13. It is optional to enter a signature that you want to use at the bottom of the email message. **Note:** Do not enter a signature here if you use the default email client on your computer. The other email client will insert the signature you have set up in that system such as Outlook.

14. Click on "Send".

15. A confirmation message window will appear. If using the default email client on your computer, you may need to click Send again. A message will appear for Microsoft asking permission to allow this action. Click Allow. An email window from Outlook will appear.

Note: When sending an email to more than one volunteer their email addresses should appear in the "BCC" field.

THE RECYCLE BIN

VMS has a Recycle Bin folder for volunteers and opportunities that have been **deleted**. Access to those folders is restricted because we found some security issues when we first transitioned to VMS.

The VMS Team frequently goes through the Recycle Bins to review the entries and clean them out.

Volunteer Recycle Bin:

- We will restore a volunteer if the profile has associated logbook entries.

- We will remove any opportunity approvals from the volunteer that has been deleted.

- Best Practices: We **don't encourage deleting** volunteers.

    o   If they drop out of a class, mark them as TMN-Interested, they may show up in a couple of years to try again.

    o   If they are deceased, mark them as TMN-InActive and then as Deceased on the first page of the profile document.

    o   If you must delete them, be sure there are **no logbook entries or approvals** associated with them.

    o   If the volunteer to be deleted appears to be a duplicate profile, please submit a Help Desk ticket rather than to delete one of the profiles; there may be other program log book entries that the chapter admin is not able to see.

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**:

    o   Accept the restore as is and remove 'RECYCLE BIN" from the name.

    o   Reenter the logbook entries in another opportunity and then delete the entry from the opportunity to be deleted. (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 (give them an expiration date in the past). 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.

REPORTS

For those TMN VMS Administrators who would like to be able to extract data from the VMS and be able to create various reports using the VMS, you are encouraged to sign-up (on the Help Desk) for the on-line training title "VMS Reporting" offered monthly by the TMN VMS Implementation Team (the training is free and on-line but registration is necessary).

1. Samaritan has created some standard reports.

2. From the Opportunity tab, select an opportunity or from the "Volunteer" tab, select a volunteer(s).

3. Click the Reports button.
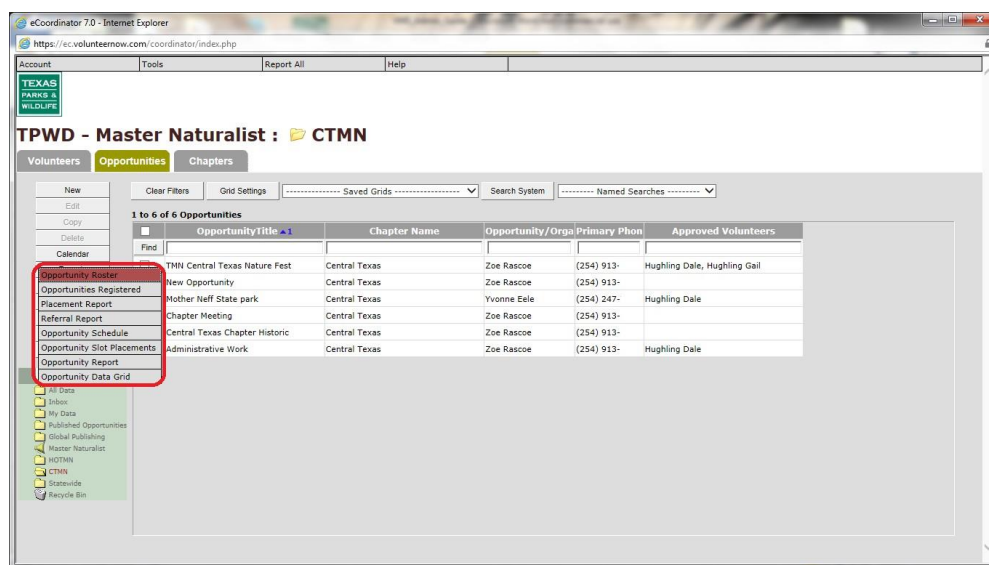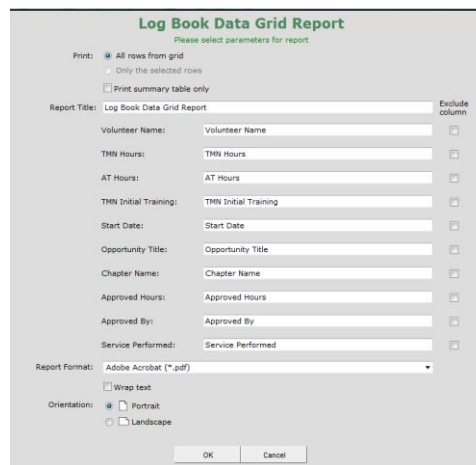
1. A drop-down list of options will appear. Select one.

- Opportunity Roster – Lists basic information about the opportunities selected.

- Opportunities Registered –

- Referral Report –

- Opportunity Schedule – List of schedules for the opportunity if scheduled slots are set up.

- Opportunity Slot Placements – List of volunteers for scheduled slot who are approved.

- Opportunity Report – List all data appearing on the grid for the selected opportunities

- Opportunity Data Grid - if you can get the data you want in a grid, you can generate a report of it using this option.

Each report can be saved as a PDF, an Excel file, or a tab delimited text file and emailed to the volunteer coordinators (the tab delimited file can also be imported to Excel or Access). As you make copies of the data, please be reminded that you have a responsibility to protect the data as it may contain personally identified elements about the volunteers.

Running a Custom Summary Hours Report

For a detailed explanation of running reports, please sign up for the 'Reporting' class on the Help Desk; there is also a 'VMS reporting Guide' on the Help Desk that you can download. This example will show you how to run a custom report of summary hours for all of your volunteers for the current calendar year. These instructions can be applied to other custom reports you might wish to run.

- Select your chapter folder then select "Log Book": "All volunteers in Grid"

    o Change the date to be January 1 of the current year and click on "Apply"

    o Change the mode to "Summary Mode" - it might be set to Detail Mode

    o Click on "All Log book entries"; includes hours transferred from other chapters

    o Select, for this example, the Grid "TMN Standard-All Hours"

    o If you want the report in alphabetical order by volunteer, click on the column heading "Volunteer Name"

    o Click on "Reports" in the menu

    o Select "Log Book Data Grid Report" from pop-up menu

    o Click (check off) the elements you DO NOT want included in the report

    o Under "Report Format", select Adobe Acrobat, Excel, or Text (Tab delimited) as the format – all can be downloaded – text files can be uploaded into other software (like Excel or Access)

    o If you select Adobe Acrobat, select either Portrait or Landscape

    o Click "OK" – the report may take several seconds to display depending on the complexity

    o Once the report is generated, you can download the output

    o For a text file, a message may appear asking if you wish to Open or Save the file, click on Open and use your application's Save option to save the file; close the report file

- When finished, click on "Close" to return to the tab

GRID VIEWS

TMN Standard grids have been created that should incorporate most of the information that you need – they begin with "TMN Standard-".

You have the capability to create a new grid to help you in generating reports for the TMN State Program Office, for your chapter, and for your sponsors.

The steps are the same whether you are working with the "Volunteer" grid or the "Opportunities" grid.

1. Click on the "Volunteer" tab or the "Opportunities" tab. The example below uses the "Volunteers" tab.

2. Ensure the value next to the Grid Setting button is "Saved Grids"; click on the "Grid Settings" button.

3. The Grid Settings for "Volunteers"

4. The available data elements can be found in the column list on the left by clicking on the "+" sign to expand the list (the list may be collapsed by clicking the "-"). If we wished to add, "Activity Status" to the grid, click the "+" next to "Volunteer" to expand it and then click on "Activity Status".

5. Use the arrows in the middle to move the column to the right or back to the left panes.

Use the "Move Up" or "Move Down" button to position the selected columns in the order in which you want them to appear.

6. Select the box "Current column sort" if you want the view to be sorted on a particular element. To select the element, click on the element to be sorted on, then in the column labeled "Sort", click the "—" to select the element as the sort field. The value "1" show appear in the Sort column.

7. You can include a Named Search to filter the records (for example, if you only wanted to view volunteers who had no value for the current chapter name). To attach a Named Search to your grid view, click on drop down for the "Currently selected named search" and select the search you want to associate with this view.

8. Enter the name of the report in the "Save As" field. Click the "Save" button, click OK.

CREATE A CUSTOM SEARCH

To create a custom search entry (for this example, we will create a search for volunteers whose date of birth is blank or is 1/1/1900:

Click on the Search System box and select "New" and enter the Search Name (in this case Find Invalid Date of Birth) and a description of the search as below. From the requirements box select Volunteer Fields to expand it and select "Date of Birth"

From the resulting dialog box, select "equals", change the date to Jan 1, 1900 and click "Save"

Then click "OK"

Once again, select Date of Birth, but this time, select "is empty" and click "Save". Click on "Close Requirements", click on "OK", and click on "Close". Your search is ready to use. When you are finished using the search, be sure to click "Clear Filters" to reset your grid view selections.

FREQUENT QUESTIONS FROM THE HELP DESK

How do I add an advisor?

Adding an advisor is just like adding a new trainee, if they do not already have a TMN VMS profile, the new advisor needs to complete the online application for your chapter. You can find the **direct link** to your chapter application by selecting the "Opportunities" tab and locating the opportunity for your chapter application (<your chapter name> Master Naturalist Application) for example: *Alamo Area Master Naturalist Application*. Edit that opportunity and locate the URL (in the title box). Copy and send that URL to the new advisor. They will need to agree to the same waivers and a CBC just as your trainees do. Once they are in the VMS system, edit their profile using the "User Defined" tab and the "TMN Officers/Committees" group to mark them as advisor, select the "Certifications" group and set the TMN-Certification Status to "TMN-Advisor" and set the Current Chapter value.

How do I get a new chapter VMS administrator trained?

New chapter VMS administrators (including those with Read-Only access) must complete either the Admin 101 or the VMS Read-Only class, both of which are offered online through Webex and taught by a member of the TMN VMS Support Team. The new administrator will need to visit the TMN Help Desk (at txmn.org/help) looking under the Administrators group for the "202x Administrative Training Schedule" to get the date(s) for the needed class(es). To register, use the URL given in the lead-in paragraph.

For VMS Read-Only training or VMS Reporting, the chapter administrator should contact Clyde Camp (c.camp@ieee.org) to set up a training time.

All training is offered online via Webex and usually run less than 2.5 hours in length.

NOTE: Admin 201 is an extension of Admin 101 where new topics are introduced and those included in Admin 101 are expanded.

Do I count my volunteer service at a State Park as Master Naturalist hours or State Park hours?

Since Texas State Parks do not compete for the federal funding that Master Naturalists and Angler Education do, there is no competition for volunteer hours between State Parks and Master Naturalists. Master Naturalist working at or alongside a State Park employee on State Park property should record their volunteer hours as Master Naturalist hours, but additionally, record the hours under a chapter approved opportunity that identifies the state park by name or, at a minimum, include the name of the state park in the description of service in the log book entry survey. State Parks have the capability to run reports on Master Naturalist log book entries selecting those that are specific to their state park and then submit those hours for their TPWD funding.

How do I create a new grid or filter?

See the section in this manual titled "Grid Views".

How do I restrict a new grid/filter to only my use (Highly Suggested)?

When a new grid or filter is created, it is generally available to all chapter VMS admins. This is highly undesirable as it clutters up the grid/filter "directory" for EVERY chapter VMS administrator. When creating a new grid/filter, you should do so with the idea that the new grid/filter is only for your use. You make the new grid/filter visible only to you during the creation of the new grid/filter by removing all check boxes in the permissions link. See the image below.
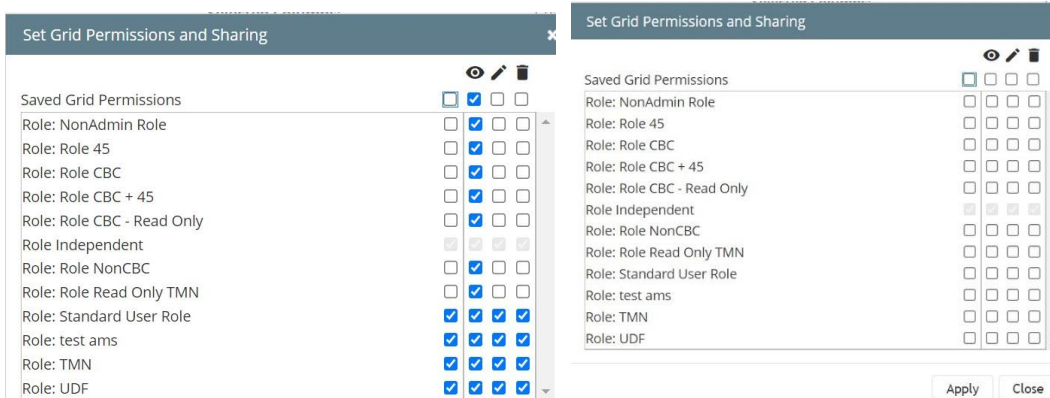
Unrestricted Grid Access   *Restricted Grid Access*

To remove the check boxes, select the grid to be worked on, click on "Grid Settings", scroll down and look on the left side for the text "Set Grid Permissions and Sharing"; click on that text, click on each blue box to remove it (if there are four checked boxes in a row, click on the leftmost box to remove all checks in the row). Click on Apply then on Close to save the changes.

How do I flush my browser's cache – use this when having trouble logging in to VMS.

(See the next page)

For Chrome:

-click on the ellipsis (the three dots in the upper right-hand corner

--Select Settings from the drop-down menu

---Select Privacy and Security

----Select Clear Browsing Data

-----Select Clear cached images and files

For Edge:

-Click on ellipsis

--Settings

---Privacy, Search and Services

---Clear Browsing Data

----Choose what to clear…

-----Cached Images and Files

For Firefox

-Menu button

--Settings

---Privacy and Security

----Cookies and Site Data

-----Clear Data

------Cached Web Content (remove check on Cookies)

How long do trainees have to complete their Initial Training?

The new (2023) version of the CMOP addresses Initial Training time limits and has been changed to state (4.4.2.) that Initial Training and Initial Certification" is recommended to be completed within 12 months of the Initial Training **start date**". For those trainees having difficulty meeting this time frame, local chapter boards and training committee members work with those trainees, perhaps through mentors, to assist them in completing the requirements.

How long do trainees have to complete their Initial Certification?

The 2023 CMOP (located on the txmn.org website) addresses Initial Certification and Initial Training now reads as follows: "… **Members are encouraged to complete the Initial Training course and AT and VS requirements for initial certification within 12 months of the start date of the Initial Training course.**"

Is travel time to and from an activity reportable for hours?

Travel time is not permitted for advanced training sessions nor Initial Training where you are the trainee (article 5.3 of the January 2023 CMOP). Travel time is allowable for any volunteer service opportunity. But some chapters put in some guidelines- like no travel for more hours than the actual activity, or some chapters may choose to not allow travel time for admin opportunities.

Article 6.5 of the January 2023 CMOP: Travel and preparation time for specific service project opportunities may be counted as service time as determined by the local Chapter.

Does serving on the board or as an officer of a partner organization count for TMN service hours?

No, not as a general rule. The basis for this answer is the "Chapter Management and Operations Protocols" manual which can be found on the TMN State web site (txmn.tamu.edu). On page 17 of that guide detailing the "Federal Opportunity Categories". This document describes and gives examples of opportunities that fall under each of the nine permitted Federal Reporting categories.

In this document, "Technical Guidance" is the category that pertains to meeting with other organizations. This category specifically **eliminates hours** that are spent in the board/committee duties of an organization **other than TMN** unless that position is specifically designated by the TMN chapter as a consultant/advisory type role to the partner organization, and the volunteer has been designated to serve that partner organization as a representative of and to promote the Texas Master Naturalist program/organization.

The volunteer activities of these other organizations (i.e. NPSoT) might be set up as volunteer service (and/or AT for that matter) opportunities for the TMN chapter if those activities are in line with the mission statement and goals of the TMN program and are approved by the local TMN chapter. So, in short, simply serving as a board or committee member of a partner organization does not in itself qualify for TMN volunteer service hours, but there are additional tests.

Can I report volunteer service hours for attending a chapter meeting?

Yes, a recent ruling from TPWD allows VH for "attending" a chapter meeting to include travel time. The basis for this change is it is felt, members attending a chapter meeting are better prepared for future leadership roles in the chapter, and because, of their attendance, become more engaged in the activities of the chapter. Attendance at a neighboring chapter business meeting is not countable for volunteer service hours as it does not meet the criteria established for permitting service hours for meetings. Advanced training offerings at other chapters may be counted for advanced training if it is preapproved by the volunteer's local chapter.

Can I report volunteer service and travel time for attending my chapter's Initial Training classes with no active role?

Yes, using the same rationale as for the question concerning attending a chapter meeting. Additionally, members who have no active role, by their presence, provide support to the trainees, and gin insights into what it takes to conduct the training, better equipping them to take on leadership roles in the chapter. Each chapter's circumstances are different as are their facilities; their may be extenuating circumstances that would require the local board, using equitable and consistent guidelines, to restrict member attendance at initial training classes.

How, why and should, TPWD add an opportunity to our member's VMS ?

HOW: every TMN volunteer profile is available to all other TPWD volunteer programs (State Parks, Angler Ed, Nature Trackers...). WHY: It is possible the volunteer did not identify themselves as a Master Naturalist and make know they wanted to report their hours to TMN, or the State Park coordinator does not know about the agreement between the two. SHOULD THEY: under normal circumstances, the State Park coordinator should not add the opportunity to the TMN volunteer, but see the response to WHY.

Will entering hours on a non-Texas Master Naturalist opportunity generate TMN hours?

No, they can only count for the TPWD other program or for TMN, and once entered under the "other TPWD program" opportunity, it is nearly impossible to get the log book entry reversed.

Why are there opportunities our members can see that our chapter admins cannot?

These are opportunities the volunteer has either signed up for on-line or has been signed up for by another TPWD program director for other TPWD programs (like Angler Education, Nature Trackers...). They cannot be edited nor updated by any of us (not the volunteer, not the chapter, and not the State VMS Team). Again, once a logbook entry is made under another TPWD program, it is nearly impossible to get it changed or deleted. The volunteer can remove themselves from an opportunity using the item "View My Placements" at the bottom of the volunteer dashboard. Anytime a volunteer signs themselves up to an opportunity, the system copies their profile into the Inbox; so, that is some cleanup the chapter admin will have to see to.

How do can I reactivate a member who has not been active since VMS started (2015)?

During conversion to VMS in 2015, all volunteers who had 1 or more hours, should have had a "skeleton profile" created for them by their last chapter. The volunteer will need to log in and complete their profile (personal data, waivers and agreements), just as a new trainee might do except they already have a "skeleton profile". They will very likely need your assistance (1. with their VMS user ID; 2. you will likely need to reset their password; 3. they will probably require some instruction in logging in to VMS and reporting hours using it). Once that is complete, you or another chapter admin should review it for completeness and update their "User Defined" - "Certifications" group with dates TMN-status (must be either TMN-In Training or TMN-Active to trigger a new CBC) and Current Chapter. If you are not going to require they retake any of your initial training, update the Chapter Trained as well, otherwise wait until they have completed those requirements. Once they have completed their profile and you have updated their TMN-status, the CBC will be run in the next batch. CBC's are usually run weekly.

What VMS entries are needed when a volunteer voluntarily resigns from the chapter?

When it is the volunteer who requests the change in status, it is suggested to have a conversation with the volunteer to determine if they are willing to share the reason for the request, if it a short term thing or more long term. Often there are extenuating circumstances in folks lives that require changes. Be sure they understand that becoming TMN-Inactive means they can not volunteer with the chapter and earn hours, but they are eligible to return to TMN-Active status if that is their desire. .Depending on the outcome of that conversation, if they still want/need to be made inactive:

1) it may be of such an occurrence that the chapter wishes to refund a prorated portion of the dues
2) change their status to TMN-Inactive and make a note in the Certifications Comments as to the reason for the change
3) approve any log book entries that are still Not Yet Approved
3) remove their approved opportunities
4) The profile remains in the chapter folder

APPENDIX

Definitions of Master Naturalist Certification Levels

TMN-In Training (Bylaws Art IV 1, 2): is a 'Texas Master Naturalist Member-in-Training' as stated in the TMN bylaws. They are a Volunteer Participant of an official class from the first day of class until the Trainee has completed **both** the Chapter Training requirements and the chapter initial certification requirements at which time the Trainee should be marked "TMN-Active" in VMS, or until one calendar year has elapsed from the first day of the trainee's training class (i.e. if the class begins on November 30, 2022; the trainees have until November 30, 2023 to complete their initial certification); prior to this "deadline", the chapter board shall work with the trainee to develop a plan for the completion of the volunteer's certification requirements or, failing in that effort, the former Trainee should remain marked TMN-In Training.

TMN-Active (CMOP Section 3.1): Is a TMN Program volunteer in the Certified or TMN Member category as stated in the TMN bylaws. A person in this category is also currently a.) signed up as a volunteer member in a chapter; b.) has a profile in the Volunteer Management System; c.) has paid dues (where applicable) for the current year; d.) has completed all the chapter initial training and completed all the initial certification requirements; and e) has submitted service and/or AT hours for the year in which the last TMN Annual Report was submitted.

TMN-Inactive (CMOP Section 3.1): Is a previously certified volunteer who is signed up in a chapter and in the Volunteer Management System and has not submitted volunteer service or AT hours to their chapter/program within a calendar year for which the last Annual Report was submitted, or they have not paid dues (where applicable) by March 31. When marked TMN-Inactive, the volunteer is notified, and opportunities are removed.

TMN-Interested : Is a potential volunteer who **(a)** has signed up on-line through the TPWD web site and has come through the VMS Inbox, has not yet attended class or does not have a 'passed' CBC, or **(b)** did not complete the TMN initial certification within one calendar year from the first day of the trainee's training class or by the date set by the chapter board as part of their collaborative effort with the trainee to work a schedule whereby the trainee could complete the requirements.

TMN-Not Eligible (CMOP Section 3.1): This category includes volunteers who have been dismissed from the TMN program, have not passed the most recent CBC or who should no longer be reporting hours or volunteering due to missing CBC required data; the Certification Comments section of the volunteer profile should be updated to reflect the reason for this status.

TMN-Advisor: This category is for TPWD and/or AgriLife advisors of local chapters.

Federal Opportunity Categories and Examples (November 2021)

Chapters are required to link each of their opportunities to one of these Federal Categories when they set them up in VMS. This chart should guide chapters in that process.

Categories	Description	Examples
Direct Outreach (Formal public training and education)	Leading, organizing, developing, delivering, instructing, or staffing an educational activity where participants have a planned learning objective and generally stay for the full event (e.g., planned start and end times with a single agenda).	• Classroom instruction • Delivering Workshops • Developing and delivering training presentations • Conducting/leading webinars • Delivering instructions for chapter MN members in a Training class • AT you prepare and present as a TMN member to other TMN members • Interpretive hikes
Advanced Training	Advanced Training you attend as a participant	• AT sessions at TMN Statewide Annual Meeting • Rainwater Harvesting Steward Program Training • Project WILD Instructor/Facilitator Training
Indirect Outreach (Indirect Education)	• Leading, organizing, or staffing an educational activity where participants come and go and are able to inquire on a broad set of topics. • Writing an educational article or brochure.	• Being a docent for a nature center (excludes selling items) • Writing articles, brochures, or newsletters • Answering a Wildlife Hotline (not on call)

Technical Guidance	Providing **free**, detailed natural resource management advice or assistance for any natural resource related program or related business. For example: providing expertise in land management guidance, in consultation or written form, to chapters, partners, landowners or land managers.	• Site visits for and writing ecosystem management plans • Land Management Assistance Program (LMAP) • Serving on a City/Community/Regional Habitat Conservation Plan Committee • Advising other organizations on natural resource management (outside of serving as a board or committee member of an organization)
Categories	**Description**	**Examples**
Natural Resource Management (including Natural Resource Stewardship and Conservation)	Activities that improve the health of a public natural area or resource. Natural resource management, restoration, rescue, and rehabilitation.	• Removing foreign debris that improves the health of a public natural area or resource • Invasive species removal • Plant or endangered Species of Greatest Conservation Need (SGCN) species rescue (not rehab) ○ E.g., Turtle Patrol • Restoring or improving natural habitat • Wildlife houses, towers, chimneys • Tree planting
Nature/Public Access	Field-based activities that improve and manage the public's access to natural areas or resources. Creating or maintaining nature trails, wildscapes or interpretive areas	Developing new or maintaining or improving existing: • Hiking trails • Interpretive native species gardens (NOT vegetable gardens) • Wildlife viewing blinds • Wildscapes/native plant gardens • Cleanup activities in habitat
Field Research (including Surveys and Citizen Science)	Planning, leading, or participating in data collection or analysis of natural resources where the results are intended to further scientific understanding.	• Field surveys • Banding and tagging • Species watch • Texas Nature Trackers Programs • CoCoRaHs • Stream Watch/Stream Team/Water Quality Monitoring • Nest box monitoring • Community/Citizen Science

| Chapter and Program Support, Business and Administration | Activities related to managing and running a Texas Master Naturalist chapter and its committees. | • TMN Chapter Board of Director or committee duties
• TMN chapter newsletter, website, or social media management
• Management of TMN chapter records and reporting
• Representing TMN chapter at multichapter events
• Other TMN chapter administration
• Assistance to TMN State Program and State Program Office |
| Other | Any activity approved by a chapter not defined above. A chapter should have less than 5% of its hours in this activity and be able to justify its use. | • Wildlife rehabilitation (not SGCN animal rescue) |

Attachments

Program Administrators may want to upload attachments to a Volunteer profile or to an Opportunity. The following steps will guide you through how to manage attachments (the steps are the same whether for a Volunteer or an Opportunity).

1. From the "Volunteer" tab, select a volunteer and click the "Edit" button.

2. Click the "Attachments" tab.

Note: There are two different types of attachments: Photo (images) and Document.

3. To upload a document (a pdf for example), click on "Document".

4. Click "Browse" to search your computer.

5. Find the document on your computer and click "Open".

6. Click the "Upload" button.

7. If you want to upload an additional type of document, click the "Modify Attachment List".

8. Click the "Add New" button

9. A new line will appear. Enter the "Attachment Type". In this example, "References" was added. Uncheck the "Visible in eRecruiter". It is not necessary to display this on webpage of volunteer's profile.

10. You can use the "Move Up" or "Move Down" button to change the order in which the documents can appear.

11. Click "OK".

12. The system returns to the "Attachments" page.

15. Click "Finish" when complete and the system will "validate the profile".

Note: Follow same steps for uploading a photo. You can only upload one photo for a volunteer or opportunity. Place a check mark in the box for "This attachment visible in eRecruiter" if you wish the image to be displayed on the website when the volunteer logs in. Important: Only ".gif" document type will publish on "eRecruiter" and the size cannot be greater than 2MB.

Repetitive Tasks: Hours Administrator

On a regular basis, that person designated by the chapter administration needs to:

- Approve volunteer log book entries (hours posted)

- Update chapter officer and committee members as elections/selections occur

- Maintain the member TMN-Certification status, certification dates, milestones, and dues

- Monitor the "Inbox" folder for new volunteers in your area

- Monitor volunteers and perform updates for milestones and recognition

Repetitive Tasks: Approvers

On a regular basis, the Approver(s) Administrator, or that person designated by the chapter administration needs to:

- Check for New Opportunity log book entries

- Un-approve volunteers for those opportunities that are expired

- Add new opportunities to the system after approving them

- Approve volunteers to the opportunity

- Monitor volunteer opportunity approvals for new volunteers

- Check the completeness and correctness of newly entered/proposed opportunities

Return to the Appendix Title Page

Texas Master Naturalist "Webex" Regional Accounts

TPWD/TMN State Program Office have provided 3 *WebEx* accounts for Texas Master Naturalist chapters to use to conduct their chapter business (committee meetings, board meetings, chapter meetings, advanced and initial training meetings and presentations, …). The only stipulation is that use of the *WebEx* accounts be restricted to the TMN chapters listed in the conduct of their business. If the meeting is recorded, be aware you must download the recording to another site as there is no assurance the recording will remain saved for an extended period of time.

Regions 1 and 3 Chapters listed below may access their account through the URL: webex.com

> User ID: Region3TMN@gmail.com
>
> Password: submit a Help Desk ticket for password at txmn.org/help

> Big Country Chapter
>
> Brush Country Chapter
>
> Brush Y Canyons Chapter
>
> Cross Timbers Chapter
>
> Elm Fork Chapter
>
> Llano Estacado Chapter
>
> Panhandle Chapter
>
> Prairie Oaks Chapter
>
> Rio Grande Valley Chapter
>
> Rolling Plains Chapter
>
> South Plains Chapter
>
> South Texas Chapter
>
> South Texas Border Chapter
>
> Tierra Grande Chapter
>
> Trans Pecos Chapter

Regions 2 and 5 Chapters listed below may access their account through the URL: webex.com

User ID: Region5TMN@gmail.com

Password: submit a Help Desk ticket for password

Blackland Prairie Chapter

Bluestem Chapter

Bois d'Arc Chapter

Coastal Prairie Chapter

Cradle of Teas Chapter

Cypress Basin Chapter

East Texas Chapter

Lower Trinity Basin Chapter

Gulf Coast Chapter

Galveston Bay Area Chapter

Gideon Lincecum Chapter

Heartwood Chapter

Longleaf Ridge Chapter

Piney Woods Lakes Chapter

Mid-Coast Chapter

North Texas Chapter

Red River Chapter

Sabine Neches Chapter

Regions 4 and 6 Chapters listed below may access their account through the URL: webex.com

User ID: Region6TMN@gmail.com

Password: submit a Help Desk ticket for password

Alamo Area Chapter

Balcones Canyonlands Chapter

Capital Area Chapter

Central Texas Chapter

El Camino Real Chapter

Good Water Chapter

Guadalupe Chapter

Hays County Chapter

Heart Of Texas Chapter

Highland Lakes Chapter

Hill Country Chapter

Indian Trail Chapter

Lindheimer Chapter

Lost Pines Chapter

Rio Brazos Chapter

Explanations for Drop-Down List under Chapter Administration

When posting hours under Administrative Work, Chapter Administration, there is a drop-down list of services   for the volunteer to choose from. This is a brief explanation of each of the items in the drop-down list:

- **Chapter Meeting** – activities relating to attending, preparing for, presiding over, or setting up for a regular   chapter meeting (other than hospitality activities – see Hospitality below)

- **Board/Committee Work** – any activity in support of the chapter through your duties as a chapter recognized committee representative or your activities in conducting chapter business as a member of the Chapter Board of Directors

- **President Duties** – any of the chapter activities which, as outlined in the Chapter Operating Handbook, are conducted in your official capacity as Chapter President (planning meeting agendas, interfacing with other chapters or agencies)

- **Vice President Duties-** any of the chapter activities which, as outlined in the Chapter Operating Handbook, are conducted in your official capacity as Chapter Vice President (planning programs, interfacing with other chapters or agencies, conducting Chapter business in the President's temporary absence)

- **Treasurer Duties** – any of the chapter activities which, as outlined in the Chapter Operating Handbook, are conducted in your official capacity as the Chapter Treasurer (preparing a budget and budget reports, presenting budget related information to the chapter)

- **Secretary Duties** – any of the chapter activities which, as outlined in the Chapter Operating Handbook, are conducted in your official capacity as Chapter Secretary

- **Hours Management** – activities relating to the review and approval of submitted hours, the preparation of reports concerning AT and Service hours both to the chapter and the State Program Office; volunteers who are officially designated by the chapter leadership to enter hours for other volunteers when those volunteers are unable to do so themselves

- **Hospitality** – those activities related to organizing others to prepare refreshments or the actual preparation of refreshments for chapter activities to include serving, delivery, setup and take down

- **Communications** – activities relating to promoting the chapter news and events through the production of a newsletter (writing articles, preparing the newsletter, publishing the newsletter),   preparing and publishing a chapter brochure, providing information to newspapers, radio, television   and other media outlets

- **Website and Social Media** – activities related to developing and maintaining a web site and/or Facebook site for the chapter or other social media outlets

- **Photographer** – those activities performed by the person or persons designated by the chapter administration to document chapter functions by means of photography or videography

- **Programs** – activities related to providing programs at chapter meetings that meet the criteria for Advanced training at a Chapter Meeting (other than actually presenting at a meeting – see the chapter opportunity for Presentations)

- **Project Management** – volunteer time spent in organizing volunteers and preparing for the success of the project; accumulating and reporting the impact data for the activity; preparing needed materials

- **Recruiting** – activities related to generating interest among potential eligible trainees in becoming a Texas Master Naturalist

- **Training Classes** – activities related to supporting the Training Class though attendance, mentorship or as a class helper (distribute hand-outs); preferable to use "Presentations" for presentation time

- **Fundraising** –activities related to raising funds or obtaining/creating items for the chapter that can be used to generate funds for the chapter, or other such activities as grant writing for the chapter or State Program

- **Samaritan VMS Rollout** – those activities related to the rollout of the VMS – for chapter personnel: preparing chapter data for conversion, training your volunteers; for the VMS Team: activities involving assisting chapter personnel with any aspect of the conversion to include chapter training, troubleshooting and responding to Help Desk questions, editing chapter upload files

- **State Meeting** – activities relating to the support of the State Annual Meeting (preparing chapter contest entries), working as a volunteer at the State Meeting; does not include presentations. Note: your chapter may have an opportunity specific to volunteering at the State Annual Meeting ("TMN Annual Meeting – Volunteer" or "AT: TMN Annual Meeting")

- **State Program Office** – activities relating to the support of state-wide projects like the Endowment Committee.

Occasionally, a volunteer will want to attend an Advanced Training or Service Project Opportunity that has not been previously approved or entered in the chapter list of opportunities. The volunteer can put in the request through the chapter specific procedures for handling volunteers submitting requests for new opportunities.

1. If the new logbook entry is approved, the administrator can create a new opportunity using the instruction in this manual.

2. The administrator must remember to approve the volunteer(s) who may participate in the opportunity.

Additional Technical Assistance

Should you have difficulties or additional questions, contact the TMN VMS Support Team. Ppaste the URL below into your browser's address bar:

https://txmn.org/help

(To better support you, please be as descriptive as you can in describing the question or the problem; if possible, include saved screen shots of the area; include your name and the name of your chapter.)

or, you may email the TMN VMS Support Team

tmnvms@gmail.com

TMN "Slack" channel:

https://txmn.slack.com

Apply to become a Texas Master Naturalist:

https://txmn.org/apply

Texas Master Naturalist Volunteers may log in and edit their profile and/or enter their hours at:

https://txmn.org/hours

Quick link to "eCoordinator" for VMS Administrators:

https://txmn.org/coordinator

TEXAS PARKS & WILDLIFE

4200 Smith School
Road Austin, Texas
78744