Volunteer Management System
User Guide
for
Texas Master Naturalist Chapter System Administrators

Last Updated July 2, 2014
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTRODUCTION</td>
<td>1</td>
</tr>
<tr>
<td>TPWD VOLUNTEER PROGRAMS</td>
<td>2</td>
</tr>
<tr>
<td>SET UP A PROGRAM/CHAPTER</td>
<td>3</td>
</tr>
<tr>
<td>VOLUNTEER SERVICE PROJECT OPPORTUNITIES</td>
<td>6</td>
</tr>
<tr>
<td>CREATE A CHAPTER SERVICE PROJECT OPPORTUNITY</td>
<td>7</td>
</tr>
<tr>
<td>CREATE SCHEDULED SLOTS</td>
<td>22</td>
</tr>
<tr>
<td>PUBLISH TO THE WEBSITE</td>
<td>25</td>
</tr>
<tr>
<td>VOLUNTEER PORTAL</td>
<td>26</td>
</tr>
<tr>
<td>NOTIFICATIONS</td>
<td>28</td>
</tr>
<tr>
<td>SET UP VOLUNTEER PROFILE MANUALLY</td>
<td>29</td>
</tr>
<tr>
<td>MANUALLY APPROVING VOLUNTEERS</td>
<td>42</td>
</tr>
<tr>
<td>REVIEWING REGISTERED VOLUNTEERS</td>
<td>45</td>
</tr>
<tr>
<td>SUBMITING HOURS</td>
<td>47</td>
</tr>
<tr>
<td>ASSIGN APPROVER</td>
<td>51</td>
</tr>
<tr>
<td>FOLDER MANAGER</td>
<td>52</td>
</tr>
<tr>
<td>VOLUNTEER ACTIVITY STATUS</td>
<td>53</td>
</tr>
<tr>
<td>CRIMINAL BACKGROUND CHECK (CBC)</td>
<td>54</td>
</tr>
<tr>
<td>EMAILING VOLUNTEERS</td>
<td>56</td>
</tr>
<tr>
<td>RECOGNITION</td>
<td>58</td>
</tr>
<tr>
<td>RESETTING PASSWORDS</td>
<td>59</td>
</tr>
<tr>
<td>REPORTING</td>
<td>60</td>
</tr>
<tr>
<td>CUSTOM REPORTS (FOR TMN REPORTS)</td>
<td>61</td>
</tr>
<tr>
<td>LOGGED DATA (SURVEY RESPONSES)</td>
<td>62</td>
</tr>
<tr>
<td>HISTORICAL HOURS</td>
<td>65</td>
</tr>
<tr>
<td>ATTACHMENTS</td>
<td>67</td>
</tr>
<tr>
<td>TECHNICAL ASSISTANCE</td>
<td>69</td>
</tr>
</tbody>
</table>
INTRODUCTION

In 2010, the Texas Parks & Wildlife Department recognized that the agency was impacted by volunteers, was not accurately tracking volunteer contributions and was inadequately reporting those contributions which could potentially impact federal grants. Their goal 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 purchased a web-based volunteer management software system called Samaritan. Samaritan’s features allow easy access to an online- application, review and select applicants, track criminal background checks, schedule and track hours, track performance and recognition milestones, and generate reports.

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.
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

Each volunteer opportunity created in Samaritan will be assigned to a program for reporting purposes. Only one program can be assigned to an opportunity.

PROGRAM = Chapter Name

For the purposes of this system, a “Program” will be equivalent to a Texas Master Naturalist Chapter and each chapter will set up their approved service projects within their “Program”

Examples: Chapters (or “Programs”) set up in the system already:
TMN Alamo Area Chapter
TMN Hays County Chapter
TMN Sabine-Neches Chapter

OPPORTUNITY = Approved Chapter Service Project

For the purposes of this system, an “Opportunity” is equivalent to an approved TMN service project.

Examples of Chapter Service Project/Opportunities set up in this system initially:
TMN Alamo Area Chapter Program has:
- TMN AAMN Phil Hardberger Park Service Project Opportunity
- TMN AAMN Invasive Plant Removal at Leon Creek Greenway Service Project Opportunity
- TMN AAMN Headwaters Sanctuary Volunteer Work Days Service Project Opportunity

TMN Hays County Chapter program has:
- TMN Hays CMN Project #424 San Marcos Greenbelt Alliance Service Project Opportunity
- TMN Hays CMN Project #603 Jacob’s Well Natural Area Service Project Opportunity
- TMN Hays CMN Project #1010 Charro Ranch Park Service Project Opportunity

TMN Sabine-Neches Chapter Program has:
- TMN Sabine-Neches Dunes Restoration as Sea Rim State Park Service Project Opportunity
- TMN Sabine-Neches Education Stations at Village Creek State Park Service Project Opportunity
- TMN Sabine-Neches Wildlife Contest Preparation for Orange County 4-H

For this pilot test the Primary Contact that has been set up in the system for each chapter/program is the person the chapter has indicated as the Volunteer Service Projects Committee Chair. The Secondary Contact listed is the person the chapter has indicated as the Membership Committee Chair. It is assumed that these individuals will be key people assisting with this pilot test.

For the purposes of the pilot test, chapters will not need to complete the following steps and can skip to VOLUNTEER OPPORTUNITIES on page 6.

Contact Michelle Haggerty for your log in and password to begin setting up additional chapter service projects in the system.

**SET UP A PROGRAM/CHAPTER**


2. Click the New button in the menu on the left.

3. The New Program Profile page appears. On the Main Info tab, begin completing the fields:
Notes:

- The Program Name field must be completed as a required field. The program name must include TMN and your chapter’s acronym. Such as **TMN AAMN Chapter with chapter either spelled out or abbreviated as Ch.** For chapters sharing the same acronym (i.e. Hays County TMN and Hill Country TMN your chapter should spell out some portion of your chapter’s acronym such as: TMN HaysCMN or TMN HillCMN.

- Registered Date is the date when the program was added to the Samaritan system. This date may not be the date in which the program was created or established.

- Volunteer Coordinator is the person who typically sets up and manages the service projects for a chapter within the system. This information is not published on the website for the public to see. For this pilot test the Volunteer Coordinator Primary Contact that has been set up in the system for each chapter/program as the person the chapter has indicated as the Volunteer Service Projects Committee Chair. The Secondary Contact listed is the person the chapter has indicated as the Membership Committee Chair.

- Primary Phone is the phone number the Volunteer Service Projects Committee Chair wishes to have published.

- Alternate Contact Name is the person serving as the Membership Committee Chair for the chapter.

4. Click Next or click on the User Defined tab.

5. From the drop down box, select the **Wildlife** division for the division your chapter program falls under. There can only be one division assigned to each program. For all Master Naturalist Chapters the Division is Wildlife.

**Note:** This is a required field to complete for reporting purposes.
6. Click Next or click on the History tab.

7. Click the Add/Edit Notes button to explain any changes that are made to the program setup. This screen may be blank until an entry is made.

**Important!** You are unable to report on any notes that are made in the history tab.

8. Click Finish when done. This will save any changes you have made and return you to the programs data grid.

9. To make changes to an existing program, select a program by clicking in the box to the left of the program name. Then click on the Edit button in the menu on the left.
VOLUNTEER SERVICE PROJECT OPPORTUNITIES

After the service projects for your chapter have been initially reviewed and approved by the appropriate committees and Board, the “opportunity” (or chapter service project) can be set up in Samaritan. The questions to be answered in preparation for setting up the volunteer opportunity are:

- Service Project Title
- Description of the project-- what work is being done on the project, is there any specific equipment that a volunteer will need to bring?
- Information about the Project related to federal grant reporting such as: will soil be disturbed and whether it impacts certain types of habitat.
- Location of the project-- including address, main county where the project takes place, city and zip code. Please also include any instructions for meeting up to work on the project (if this info exists) such as: "Chapter members should meet at Parking lot B at the wildflower pasture trail" or any other detailed information you would want published.
- Contact person for the project (which TMN volunteer in the chapter is the project lead/project coordinator) including phone, email address and if the project info has a website for other resources about the project.
- Number of TMN volunteers needed for the project (if applicable)
- Is the project on-going throughout the year (or more) or does the project have a specific work date/event date--If so please include the date(s).
- Will this project opportunity be held several times on different days of the calendar throughout the year and at different locations?
- Will this project include working with youth? If yes, a criminal background check required to work on this project opportunity

Ideally, the creation of further Service Project Opportunities for your chapter in this Samaritan Volunteer Management System will be completed by your chapter’s Service Project Committee Chair and/or their committee members/designee(s)

When the Chapter approves a TPWD service project opportunity that is already in the system, the project will also need to be set up specifically for your chapter. If the opportunity is not set up 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. Examples of these are opportunities that are already published on the TPWD website. These opportunities have been set up by other agency personnel in other programs and divisions. If a member were to report to those, their time would not be counted as TMN service time.
CREATE A CHAPTER SERVICE PROJECT OPPORTUNITY


   **Note:** Contact Michelle Haggerty for your log in and password to begin setting up additional chapter service projects in the system.

2. Click the New button in the menu on the left.

   ![Texas Parks & Wildlife Department: My Data](image)

   ![Texas Parks & Wildlife Department: Opportunity Details](image)

3. The New Opportunity Profile page appears. On the Main Info tab, complete the Opportunity Title. **If your chapter is using project codes this would be the place to include the project code along with the project code’s corresponding title.**

   **All Opportunity Titles should begin with:** TMN XYZ Chapter:
   Or TMN XYZ Ch:

   **Example:** TMN Alamo Area Chapter: Phil Hardberger Park
   Or TMN Alamo Area Ch.: Phil Hardberger Park (with Chapter abbreviated is fine too)

   **Note:** For chapters sharing the same acronym (e.g. Hays County TMN and Hill Country TMN your chapter should spell out some portion of your chapter’s acronym such as: TMN HaysCMN or TMN HillCMN.

   **Note:** This is a required field. There is no spell check so be careful what is entered since this is the main title that volunteers will see when they visit our website or enter their service.
4. Enter the description of the opportunity. **Every description should begin with:** Texas Master Naturalist _____ Chapter Project: (as above) It is also suggested that you include some verbiage that this project is for members of the ____TMN Chapter.

   Example: Texas Master Naturalist Alamo Area Chapter Project: Phil Hardberger Park

   **Important:** If the opportunity does not have scheduled slots on the calendar then the start date can be entered in the description field so that it is published on the website.

5. Click Next or click on the Program tab.
6. Select your Chapter’s name (AKA: Program) and click Next. (E.g. TMN Alamo Area Chapter, TMN Hays County Chapter or TMN Sabine-Neches Chapter)

**Note:** This ties your chapter’s projects to your chapter/program. Please make sure you select the correct chapter/program or else your members will not be able to report to your service project opportunity.

7. Click Next or click on the Job Category tab.

![Job Category Image]

8. Select the “Texas Master Naturalist” as the job category the opportunity is promoting.

**Note:** This list will affect the Activity search results the volunteer/member receives from the website.

9. Click Next or click on the Contact Info tab.

![Contact Info Image]
10. Fill in the Service Project Contact information for this project opportunity. **This should be the preferred contact information for your TMN Chapter member leading this service project (Project Coordinator).** An alternate contact person may also be added here too.

11. 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 Program” box and the contact information will be copied from the Program fields. Otherwise fill out the fields. **These fields will be displayed on the website as part of the opportunity—so only include information you want public for the project coordinators.**

12. Click Next or click on the Location Info tab.

13. 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 Program 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.

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

15. Click Next or click on the Region tab.
16. This tab directly affects the search results when a volunteer clicks on the regional map on eRecruiter. Check the region that applies to only your chapter.

For the purposes of this pilot test the Alamo Area Chapter will select South Texas Plains
The Hays County Chapter will select Hill Country
The Sabine-Neches Chapter will select Gulf Coast

17. Click Next or click on the Interests tab.
18. Select “Master Naturalist” under the Wildlife heading for all TMN Chapter service projects. Optionally, you can also select the personal interests the member should have for the specific project. This list will allow you to run a query in eCoordinator for volunteers who have selected the same interests.

Note: None of these interests will appear on the search for opportunities page.

19. Click Next or click on the Availability tab.

20. Select when you need a volunteer to be available for the project. You are able to select multiple days and times. If there are no set dates/times for a project select “anytime”.

Note: If you are using scheduled slots to indicate the date and time when you need volunteers this page can be left blank. [For the purpose of this pilot test we will not utilize the scheduled slots feature.]

21. Click Next or click on the Logistics tab.
a. Enter “Any additional information about this opportunity”. This can be personal equipment and safety items the member needs to bring for the service project opportunity.

b. Enter the minimum age of volunteers (must be greater than 1). If you are using scheduled slots this field can be left blank. All Master Naturalist projects should indicate a minimum age of 18 at this time.

c. Enter the total Number of volunteers needed. If you are using scheduled slots this field can be left blank. This number cannot be lower than what is set up in the scheduled slot.

**Important! Once members register and are approved for the opportunity and it is equal to or greater than the Number of Volunteers needed, the opportunity will no longer be published on the website.**

**NOTE:** Most Master Naturalist projects can leave the number of volunteers box blank.

d. Enter “How many hours will volunteer serve per week?” Note: This field is commonly used for opportunities where volunteers are working on a continuous basis.

e. Opportunity Creation Date is the date when the opportunity was set up in the eCoordinator system. This date should always be the date the opportunity was entered into eCoordinator. If you move it to a future date the opportunity will not display in eRecruiter until that date.

f. Opportunity Expiration Date is the date you want the opportunity to end (if it has an end date). The system currently automatically defaults the date to one year from the creation date. **NOTE:** It is recommended that if the service project opportunity is an ongoing project for your chapter then select December 31 of any future year your chapter would want to review and evaluate the project. Chapter service projects will need to be re-set at that time. However, the same ongoing project can be copied over for the following year and the dates re-set. Volunteers can log hours against an opportunity as long as the opportunity has not expired. For TMN program reporting purposes, chapter leaders should pull reports at a date that will satisfy your chapter’s annual report to the state office. Likewise, you will want to alert your members when this is done for the year to
ensure they input their service reports in time for the annual report and certification periods.

g. Display Begin Date and Display End Date limits how long the opportunity will display on the website to the public. These dates must be within the time range set in the Creation/Expiration date fields.

**Important!** *The Display Begin Date must be greater than the Opportunity Creation Date.*

h. Mark the opportunity as Requested, Approved or approved into schedule slots if already placed with opportunity. **For the purposes of this pilot test 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: requested, approved, approved into schedule slots if already placed with opportunity]

If you select Requested: This 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 without additional authorization needed by the Chapter Board before they will be allowed to report service for this opportunity. For projects involving direct contact with youth, 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:** Select this for all service project opportunities **[for the purposes of this pilot test]** This option allows for volunteers who sign up 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.

**Approved into Scheduled Slots:** **[For the purposes of this pilot test we will not utilize the scheduled slots feature]** 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 first 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.

22. Click Next or click on the User Defined tab.

23. Select “TMN Federal Reporting” for all service project opportunities you will set up.

24. Answer the questions that appear as they relate to the project.

- **Will Soil be disturbed:** (Required) Select yes if the project involves planting, digging, installation of below-ground posts or supports, trail maintenance where soil will be displaced, etc.

- **Birds/Mammals:** (Required): If the project directly impacts individual bird/mammals or populations of birds/mammals, or the habitats in which they live, select yes. Examples include field surveys of birds/mammals, hikes through wildlife habitat, installation of gardens that benefit birds or mammals. Select “No” for surveys of animals that are not birds or mammals, for any indoor projects, or for most plant-type projects.

- **Congressional District:** (Optional) Enter the Congressional District where the service project takes place. Note: Some County Extension Agents who are advisors to TMN chapters will require this information. Consult with the County Extension Agent who is the advisor to your chapter on whether they will need information on the Congressional and Legislative Districts for the projects your chapter works on.

- **Legislative District:** (Optional) Enter the legislative district where the service project takes place.

- **Category:** (Optional) Select the category that fully describes all activities of the project (If possible). Volunteers will be asked to report on different activities performed for each project and each work date when they report their service later so if there are multiple categories a location or project has, that information can be tracked and reported later.
<table>
<thead>
<tr>
<th>Activity</th>
<th>Code</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
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| Training & Educating Others (Direct) | TR   | Leading, organizing, 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  
• Workshops  
• Presentations  
• Webinars  
• Chapter MN trainees/interns class |
| Advanced Training                 | AT   | Advanced Training you attend as a participant                              | • AT sessions at TMN Statewide Annual Meeting  
• Rainwater Harvesting Steward Program Training  
• Project WILD Instructor/Facilitator Training |
| Public Outreach (Indirect)        | PO   | Leading, organizing, or staffing an educational activity where participants come and go and are able to inquire on a broad set of topics. <or> Writing an educational article or brochure. | • Manning booth or visitor center  
• Writing articles or brochures  
• Wildlife Hotline |
| Technical Guidance                | TG   | Any work that provides written management recommendations to land owners and/or land managers. | • Writing/developing ecosystem management plans  
• Land Management Assistance Program (LMAP)  
• City/Community/Regional Habitat Conservation Plan Committee |
| Natural Resource Management       | RM   | Activities that improve the health of a natural area or resource. Natural resource management, restoration rescue and rehabilitation. | • Invasive species or trash removal  
• Plant rescue  
• Restoring or improving natural habitat  
• Wildlife houses, towers, chimneys |
| Nature/Public Access              | NPA  | Field-based activities that improve and manage the public's access to natural areas or resources. | Developing new or improving existing:  
• Hiking trails  
• Interpretive gardens |
| Field Research (Including Surveys) | FR | Creating and/or maintaining nature trails, wildscapes and/or interpretive areas | • Wildlife viewing blinds  
• Wildscapes  
• Interpretive hikes |
|-----------------------------------|----|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| Chapter & Program Business/Administration | CB | Planning, leading or participating in data collection and/or analysis of natural resources where the results are intended to further scientific understanding. | • Field surveys  
• Banding and tagging  
• Species watch |
| Other | OT | Activities related to managing and running a master naturalist chapter and its committees. | • Board of Director or committee duties  
• Newsletter or website management  
• Management of chapter records  
• Hours reporting  
• Chapter reporting  
• Representing chapter at multi-chapter events  
• Other chapter administration  
• Assistance to State Program and State Program Office |

25. Click on Facility and enter the Facility Name and Facility Type. The Facility Name should appear in eRecruiter when the opportunity is published. Note: If you have scheduled slots for the opportunity where the location and facility name may be different then leave these fields blank.
26. Click on Job Rate. **Fill in $19.50 for ALL Master Naturalist Service Project Opportunities.** ($19.50 per hour is the value of Texas Master Naturalist volunteer time as per our current program grant.)

![Opportunity Profile: Texas Master Naturalist Special Events](image)

27. Click Next or click on the Approvers tab.

![Opportunity Profile: TMN Alamo Area Chapter: Phil Hardberger Park](image)

28. Select the approver(s) for this opportunity. This should be the person(s) in your chapter who currently receives and compiles members’ time sheets. (In this system, all TMN volunteer service time submitted toward approved service opportunities are required to be approved by an administrator(s) in your chapter.) The approvers can be leaders of your chapter—In most cases this includes your Service Projects Committee Chair, your Membership chair and/or the person(s) responsible for compiling and submitting your chapter’s quarterly reports to Michelle Haggerty. A TPWD employee may also be set up to do this too.)

28.1. Click on the right arrow to move their name into the right box.

28.2. If the approver does not show up in the list on the left, click “New” at the bottom to set up a new approver in the system.
Note: Be sure to email the approver their user ID and password. (See “Assign Approver” section of this guide for more information.)

Currently the following are set up:

**Alamo Area**
Nancy Thoss approver login and password: nthoss
Linda Gindler approver login and password: lgindler
Pamela Ball approver login and password: pball

**Hays County**
Beth Ramey approver login and password: bramey
Larry Calvert approver login and password: lcalvert
Art Arizpe approver login and password: aarizpe

**Sabine Neches**
Amanda Adair was already set up in the system by someone else.
Kim Huch approver login and password: khuch
Leila Melancon approver login and password: lmelancon

29. Click Next or click on the History tab.

- **Opportunity Profile: TMN Alamo Area Chapter: Phil Hardberger Park**

30. The system will track any changes made to the opportunity here. You can click Add/Edit Notes button to enter any additional notes about the opportunity.

Note: You are unable to add this information to a report since there is no field in the opportunity grid.

For the purposes of this pilot test we will not use this following “Sign In” feature. Please SKIP TO “Attachments” and number 33 (page 20).
31. Click Next or click on the Sign-in tab.

32. The Sign-In Stations are only used at specific locations. See your administrator Michelle Haggerty for more information. At this time we do not foresee Master Naturalist Service Projects using this feature of the system. No information is needed to be entered on this “Sign-in” tab.

33. Click Next or click on the Attachments tab. Attachments can be event fliers or the like.

34. You can upload an image or a document from this tab. The maximum size image per attachment is 2MB. The only file type that can be uploaded is a jpeg file or BMP file.
   34.1. Click Browse to locate the image on your computer.
   34.2. Click the Upload button.
**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.

35. 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 impacts to online.

![Opportunity Profile: TMN AAMN: Phil Hardberger Park](image)

36. A list of available surveys will be listed on the left. Select a survey on the left and click the right arrow 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 the Volunteer Survey (TMN).** This is how members will report their service time to the project and the TMN program. This is also how project coordinators will report impacts on the project too.

**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.

37. Click Finish. This will save the opportunity information and return you to the Opportunity grid data.

38. For the purpose of this pilot test we will not utilize the “Scheduled Slots” feature of the system. You may skip to page 25 and “PUBLISH TO WEBSITE”

**Note:** If you have a request for additional custom surveys for your Chapter Program, contact Michelle Haggerty at michelle.haggerty@tpwd.state.tx.us or 830-896-2504.
CREATE SCHEDULED SLOTS
1. Scheduled slots are used when there are specific dates and locations for an opportunity. Dates and location are displayed on the website. Multiple volunteers can be assigned to each scheduled slot.
2. From the Opportunities tab, select an opportunity by clicking in the box to the left of the opportunity title.
3. In the menu, click the Calendar button.

5. 

6. Click the word Add on the date in the calendar.
7. Under the Basic Information tab, enter the Description / Purpose of the opportunity. Follow the guidelines from the volunteer management guidelines manual. Enter “Any special message for volunteers?” For example: If you require they bring special equipment.
8. Enter the Start Date.
9. Enter the Start Time
10. Enter the End Date
11. Enter the End Time
12. Enter the Minimum volunteers needed.
13. Enter the Maximum volunteers allowed.

Note: This number cannot be greater than what was entered on the main opportunity location tab.

14. Enter the Facility Name and Facility Type.
15. Under the Location Information tab, enter location address. This may be different from the opportunity. If it is the same, click the box called “Same as Opportunity” and the system will copy the information from the opportunity location tab.
16. Enter City
17. Enter State
18. Enter Zip
19. Enter Phone Note: This may be used for the volunteer coordinators contact phone number for that day.
20. If the opportunity is reoccurring then click on the Repetition tab and complete the fields.

Note: The system is unable to create a bi-weekly schedule at this time.

21. Under the Volunteer Request and Approval tab, you can select which volunteer has signed up and click Place to approve them for the scheduled slot.
22. Under the Automatic Log Book Entries tab, choose an option.

Note: The History and Notes tab is where you can add misc notes about the activity for the scheduled slot.
24. 
25. Click OK.
26. The system takes you back to the calendar. Verify the scheduled slot information. Click the red X to close the calendar view to return to the opportunity data grid.
PUBLISH TO THE WEBSITE

1. From the Opportunities tab, select an opportunity (or all of your opportunities) by clicking in the box to the left of the opportunity title.

2. Click the green arrow next to the Published Opportunities folder on the bottom left. This will publish your chapter’s projects to the TPWD website. It will also allow your members to search and ‘register’ for the chapter projects that are of specific interest to them. If the opportunity is not published your members will not be able to find the project…nor will they be able to report to the project either.

3. Go to eRecruiter to view the opportunity. Make adjustments to the opportunity set up if necessary.

   **Note:** You do not have to un-publish the opportunity to make changes in eCoordinator and for those changes to appear in eRecruiter.

4. View the opportunity on eRecruiter or the website.
VOLUNTEER PORTAL

For the purposes of this pilot test, it is assumed that your TMN Chapter members assisting with the test have not yet logged into this system. Please skip to page 29 “Set Up Volunteer Profile Manually”.

Any Volunteers and your Chapter members can learn of opportunities from the TPWD website http://www.tpwd.state.tx.us/, click Get Involved and then Volunteer. This will take you to the Samaritan volunteer portal.

Once the volunteer home page opens, the volunteer can click on the following button:

Apply to Become a Volunteer

to create a volunteer profile.
If the volunteer already completed a profile, they can click on the button and log in to access their information.

If a volunteer is unable to access the web page to create a profile and submit hours, the program administrator can create their profile in eCoordinator on the volunteer’s behalf. See page 29 for instructions on how to manually set a member’s profile.
NOTIFICATIONS
When the volunteer registers, they receive the following automatic notification from the system:

Dear James,

Thank you for registering with the Texas Parks and Wildlife volunteer system. We look forward to working with you in our various programs.

Your information has been sent to the appropriate volunteer coordinator, who will be in contact with you.

If you haven't done so already, please visit the website and search our available volunteer opportunities and sign up for any that interest you.

Again, we thank you for your willingness to volunteer with Texas Parks & Wildlife.

The volunteer coordinator receives an automatic notification from the system when each volunteer registers for one of their opportunities. Below is an example of the volunteer coordinator notification:

Dear [volunteer coordinator],

Volunteer Mark Lostracco has signed up for your Fishing Event Volunteer service opportunity. Please determine if they are eligible for the opportunity and assign to event.
SET UP VOLUNTEER PROFILE MANUALLY

For the purposes of this pilot test your chapter will have the ability to set up member profiles for those participating in the test manually. It is assumed that a leader of your chapter will complete this step. Perhaps the most appropriate officer or committee chair that would complete this step may be the Membership Chair or Service Project Committee chairperson or another designee for the chapter. Keep in mind that the chapter’s log in is a shared log in at this time with restrictions that only one person can be using it and working in the system at any given time. Prior to this pilot test, no members have been pre-entered in the system.

The following steps are for setting up a volunteer profile by the Program Administrator (or Chapter log in holder) in eCoordinator.

If the volunteer/member does not complete the online application the program administrator can set up the volunteer profile manually. An alternate workforce waiver form and criminal background check form must be filled out along with a sign in sheet with hours worked. (Note: Master Naturalists have already completed these items upon their initial application and registration prior to their first training class for your chapter).

2. The system defaults to the Volunteer tab. Click New in the menu.

   Note: All information is secure and only accessible by authorized users. Email addresses are not shared and will not be displayed in any outgoing group emails. The program administrator only sees the following screens. The public (volunteers) see what is published through eRecruiter.

3. The New Volunteer Profile appears. On the Personal tab enter the volunteer’s/member’s contact information from the volunteer application.
**Note:** Any field with an * is a required field.

3.1. Enter the First Name.
3.2. Enter the Middle Initial.
3.3. Enter the Last Name.

**Note:** If the volunteer provides a nickname this information is entered into eCoordinator in the User Defined tab. In eRecruiter the nickname field is in the Name and Contact information section of the online application.

3.4. Enter the Gender.
3.5. Enter the Birth Date.
3.6. Enter the User ID.

**Note:** The user ID should be between 6-30 characters long and different than the password.

3.7. Enter the Password.

**Note:** The password must be between 8-30 characters with at least 1 number. The user will use this login information to return later to update his/her profile.

**NOTE:** Write down the user ID and password that was created for each member. They will need it to log into the system later to report to the service opportunities. (They may change/reset it later if they desire)

**Important:** The system will not prompt the volunteer to reset their password to something unique. The program administrator should encourage volunteers to set up or reset their password to something unique.

3.8. Enter the password again in the Verify password field.
3.9. Enter the Mailing Address. (This is used as the volunteer’s shipping address.)
3.10. If necessary, enter the Apt #.
3.11. Enter the City, State, County, Zip and Country in the specified fields.
3.12. Home Phone - Enter the phone numbers as (xxx)xxx-xxxx.

**Note:** In eRecruiter the system does not pre-format entries. There is text on the web page to give the volunteer guidance on how to enter their phone number.

3.13. Enter the Cell Phone.
3.14. Enter the Email Address.

**Note:** If there is no email address then enter NA. The field is not case sensitive.

3.15. Enter the email again to Verify Email.
Note: The system does not validate if both email addresses are the same. If the volunteer enters two different email addresses the program administrator will have to contact the volunteer to get a valid email address.

3.16. Select “When is the best time to contact you?” from the drop down list.
3.17. The Activity Status is defaulted to a pending status for ALL volunteers.

For purposes of the test select “Active”

Note: The purpose is for those opportunities that require a criminal background check. Once the background check is complete the status can be changed to Active. Master Naturalists have their background checks completed through the Texas AgriLife Extension Service prior to being accepted to a training class. Because of this prior background check select “active”

4. Click Next to go to the Region tab. This is where the majority of the chapter’s projects occur.
   Note: Most volunteers may not be familiar with these regions (Texas State Travel Regions) so we do not require this information to be filled out. The online application on eRecruiter does not ask for this. Move to the next tab.

5. Click Next to go to the Languages tab. Select all that apply or leave blank.

6. Click Next to go to the Interests tab. Master Naturalists must select: “Master Naturalist” under the “Wildlife” heading. Optionally, other listings that may apply to you/the individual may be selected as well.
Note: The volunteer/member can tell you what the types of things they are interested in doing. This is useful when the program administrator wants to run a report based on one or more of these interests to suggest or recruit members for a specific project in need. An email can be sent to all volunteers who meet the criteria.

7. Click Next to go to the Ethnic Background tab. Select volunteer’s ethnic background if they choose to disclose. This is optional. If they do not disclose then select Optional.
8. Click Next to go to the Availability tab. Select all that apply.

![Availability Tab](image)

**Note:** Under Misc is an “anytime” selection. If the volunteer does not say then select this option. This information is used for running reports for a specific need to assist the program administrator in recruiting for an opportunity. **Master Naturalists that do not plan to volunteer on specific times should select “Anytime” This is interpreted by the system as “Multiple times”**

9. Click Next to go to the User Defined tab. There are several group items listed.

10. Click the General Group line.

![User Defined Tab](image)

10.1. The nickname of the volunteer can be entered here.

10.2. Several programs require additional questions as part of the background screening.
10.3. If the member is a Master Naturalist AND a TPWD employee please select NO here. If there is no check mark then it is assumed they are not a TPWD employee. The system was initially set up to eliminate service time of those who are TPWD employees from the reports due to requirements of other programs in the agency. However, some Master Naturalists are also TPWD employees who volunteer on their own time. By selecting ‘no’ this will allow those individuals’ hours to be included in Master Naturalist service time and included as part of their individual records for the program.

11. The next group item Insurance Status group is not needed for the Texas Master Naturalist program. This is required mainly for volunteers who operate equipment or drive TPWD vehicles and it generally only applies to other volunteers working in State Parks. Skip to number 12 below.

**New Volunteer Profile: Mouse, Minnie**

**Note:** This is used for internal purposes. This information is entered by a program administrator only and is not displayed on eRecruiter. We require proof in writing. The program administrator can scan the original document in and attach it to the volunteer record. See the Attachments tab.

12. Click the Background Check group line. The volunteer must sign a criminal background check authorization form if the program administrator is setting the volunteer up in eCoordinator and if the volunteer is signing up for an opportunity that requires a Criminal Background Check.

**Note:** Texas Master Naturalists have been through a volunteer background check through the Texas AgriLife Extension Service Youth & Volunteer Protection Standards (YPS) background check. Enter the date of the member’s last background check here.
12.1. Select Yes indicating the member agreed to a CBC/YPS Background check prior to their acceptance to the TMN program at the chapter level. In the event a member did not go through a background check then the volunteer cannot be assigned to an project opportunity working with youth.

12.2. Enter the legal name as it would be signed.

12.3. Enter the date the form was signed. Alternatively, you could select today’s date.

12.4. Under Internal Fields enter the most recent CBC/YPS date the system only goes back to 2011. If the most recent date is within the timeframe of the system, enter it, alternatively, you can enter today’s date.

12.5. Enter the CBC Expiration date. As per the Texas AgriLife Extension Service Standards used for the TMN program, this should be three years from the most recent CBC date. As per the Texas AgriLife Extension Service Background check (YPS) policy (which is the policy the TMN program is required to follow), a member should undergo a background check every three years at a minimum. Alternatively, you could select three years from the date of being set up in the system.

**Note:** The system will use this date to determine if it’s been more than a year since the last CBC. An alert will be sent to the program administrator. A report can also be run on these fields in the event volunteers may need more frequent CBC completed or for audit purposes.

12.6. Enter the CBC result of Pass or Fail.

12.7. Enter the name of the person who would have approved the YPS/CBC background check. In most cases this would be the Texas AgriLife Extension Agent completing these for your chapter applicants.
12.8. Enter the physical address of the volunteer. This may be different than the mailing address and is required for CBC checks.

13. Click on the Alternative Workforce group line. All volunteers are required to read and agree to the Alternative Workforce/Liability Waiver statement. Master Naturalists are required to read and sign this statement as part of their application process to their chapter so this should already be on file with your chapter.

13.1. Enter their legal name.
13.2. Enter the date they signed the form. Alternatively, select the date you entered the member into the system.
13.3. Select agree. (since they already agreed to the Program’s Alternative Workforce Agreement/Liability Waiver when they applied to your chapter).

**Important!** If the volunteer does not sign they agree they are not able to volunteer.

14. Click on the Group Affiliation group line. Enter the group the volunteer is associated with. Master Naturalists should enter the Master Naturalist Chapter to which they belong.

**Note:** What is entered here matters for your search for chapter members later on. As a system administrator you may have to search by both your chapter acronym and full chapter name to view all of your chapter’s volunteers—especially if they register themselves or update their profile themselves later on.
15. The Certifications group line is completed if the volunteer has completed the required certifications for specific programs. Master Naturalists should select either: Inactive, Training or Certified. Enter any other information if you are certified in the other programs listed.
New Volunteer Profile: Mouse, Minnie

<table>
<thead>
<tr>
<th>Personal</th>
<th>Region</th>
<th>Languages</th>
<th>Interests</th>
<th>Ethnic Background</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Defined</td>
<td>Registration</td>
<td>Emergency Contact</td>
<td>Attachments</td>
<td>History</td>
<td></td>
</tr>
</tbody>
</table>

**Personal Details**

- **Name:** Mouse, Minnie
- **Gender:**
- **Date of Birth:**
- **Social Security Number:**
- **Height:**
- **Weight:**
- **Hair Color:**
- **Eye Color:**
- **Religious Affiliation:**
- **Marital Status:**
- **Address:**
- **City:**
- **State:**
- **Zip Code:**
- **Phone Number:**
- **Email Address:**

**Programs**

- **Master Naturalist**
  - **Certification Level:**
  - **Date current level of certification completed:**
  - **Training Hours Completed:**
  - **Comments:**

- **Angler Education**
  - **Alternate Workforce:**
  - **Permit:**
  - **Background Check:**

- **Fly Fishing Education**
  - **Instructor:**

- **Archery Education**
  - **Alternate Workforce:**

- **Boater Education**
  - **Alternate Workforce:**

- **Hunter Education**
  - **Alternate Workforce:**

**Additional Information**

- **Comments:**

---

**Note:** This is tracked by the program administrator and is not public to the volunteer through eRecruiter. Each certification is for specific programs identified during the implementation of this system.
16. Click on the Permit group line. Enter the permits that have been issued to the volunteer by TPWD.

![New Volunteer Profile: Mouse, Minnie](image)

**Note:** This is tracked by the program administrator and is not public to the volunteer through eRecruiter.

17. Click on the Recognition group line. Enter information for the 40 hours (Certification) Milestones of 250 hours, 500 hours, 1000 hours, 2500 hours and 5000 hours if the member has been awarded those TMN Milestone Awards. There is no need to enter any dollar amount for those items.

**Note:** This is tracked by the program administrator and is not public to the volunteer through eRecruiter.

18. Click Next to go to the Registration tab. This date represents when the volunteer record is created in the system. This date is system generated. Move to the next tab.

![New Volunteer Profile: Mouse, Minnie](image)

19. Click Next to go to the Emergency Contact tab. Enter any emergency contact information you or the member would like to provide. The member may also update this information in their profile later on.
20. Click Next to go to the Attachments tab.

**Note:** This is where you can keep a photo of the volunteer if they send you an image. You can also upload any documents you want to track for the volunteer. **Example:** If you collect references for the volunteer they can uploaded as a word doc on this tab.

21. If you like, select photo or document. Click Browse and select the image or document from a file on your computer.

**Note:** There is a 2MB maximum for each attachment. Click upload. The image or document should show in the Image Thumbnail box. **Note:** This information will not be visible to the volunteer in eRecruiter.
22. Click Next to go to the History tab.

Note: Each time you make a change to the volunteer/member record it is recorded on this tab. You can also add/edit notes. Important: You cannot report off of any notes you add on this tab. You can export history for the volunteer if necessary.

23. Click Finish to save the member record.
24. The system takes you back to the Volunteers grid.
25. Continue to “Manually Approving Volunteers” instructions listed next
MANUALLY APPROVING VOLUNTEERS

Once a volunteer/member is manually set up in eCoordinator, you may also manually approve them to Chapter project opportunities. You may use this option to add volunteers to a project whether the project is published to the TPWD website or not.

It is recommended that you allow your chapter members to search for and register your chapter’s projects on their own. This minimizes the chapter administrator’s workload in setting up the system and allows the member to customize their opportunities they would like to work on (and report to) within your chapter. If you are not manually approving members to any projects you may skip to “reviewing Registered Volunteers on page 45 or “Submitting Hours” on page 47.

1. At the eCoordinator Volunteers Tab, select the chapter member you would like to manually approve to your chapter projects.

2. Select the Request/Approve button
3. In the Volunteer Approval window select the chapter projects you would like to manually approve the member to.

4. Select “Approve”.
5. The Project selected will then move to the “Approved Opportunities” box for the member selected.

6. Select Finish and you will be taken back to the Volunteers Tab screen in eCoordinator.
REVIEWING REGISTERED VOLUNTEERS
For the purposes of this pilot test, all members participating in the test will have a profile created manually for them and your chapter will not need to complete this step. Continue to page 47 and the “Submitting Hours” instructions

When a volunteer/member registers for an opportunity using eRecruiter, they will appear in the volunteer grid with “New” next to the volunteer name, their status is pending. The program administrator must review all volunteers and determine if the opportunity requires a criminal background check.

If no, then the program administrator can change the status to Active for each volunteer.
1. Select the volunteer by clicking in the box next to their name.
2. Click Edit.
3. On the personal tab change the Activity Status to Active.
4. Click Finish to save and return to the volunteer grid. The “New” should disappear.

RUN A REPORT ON REGISTERED VOLUNTEERS FOR A SPECIFIC OPPORTUNITY:
1. On the opportunities tab, make sure grid shows requested volunteers. Use Grid Settings to customize grid.
2. Select the opportunity with requested volunteers.
3. Click Reports in the menu.
4. Select Request report.
5. A request for reports window appears. Select the appropriate fields to display on report and click OK. A PDF report will open.

REVIEWING VOLUNTEERS WHO HAVE REGISTERED FOR A SPECIFIC PROJECT OPPORTUNITY:
1. On the opportunities tab, select the opportunity and click Request / Approve.
2. The Opportunity Approval windows will open.
3. Under the Requested volunteers section, select the volunteers who have signed up and click the approve button on the right.

**Note:** The list under “volunteers” is all volunteers listed under your program account. You can move those names to the requested volunteers section by clicking next to their name and clicking on the Request button.

**Important!** If the opportunity requires a Criminal Background Check (CBC) then the volunteer will remain under the requested list until the CBC can be verified.

4. Click Finish when done.
5. The system will return you to the Opportunities list.

**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.
SUBMITTING HOURS
1. The volunteer/TMN Chapter member will log into the website at http://ec.volunteernow.com/custom/1353/

Or they may select “volunteer” on the “Get Involved” link on the Texas Parks & Wildlife Webpage www.tpwd.state.tx.us to take them to the same log in page.

NOTE: If a member does not have computer access and they have handed in a signed time sheet the chapter system administrator (or their designee) may enter the individual’s time for them following the instructions below. In this case, you may want to scan and upload the member’s written time sheet in the system as a supporting document in their profile.

2. Select the “Volunteer Login” button
3. Then log in using the user name and password that was created for them/by them.

![Volunteer Login](image)

4. Click on Report Service in menu.

![Volunteer menu](image)

5. Then select the project survey you need to report TMN service hours to from the list. The name of the opportunity will be listed with the title of the service project opportunity and the “Volunteer Service Hours (TMN)” survey after it. **All Master Naturalist volunteers should fill out this survey to report their time.** Project titles with TMN listed at the front will have time attributed toward TMN service totals to be used toward our certification, re-certification and milestone awards. Projects without the TMN listed in front of them will not have service reported toward TMN certifications and milestone awards. If a member sees a project listed that they have registered for and they would like to have it added to your chapter’s listing you (the chapter) would need to have the project reviewed, approved and set up in the system as a TMN project for your specific chapter.

6. Once a member selects the project they would like to report to, the following “Survey” or service report time sheet will appear. Complete the fields requested as they pertain to their work on the project for that date. The date that appears automatically defaults to today’s date. You can change the date to the actual day of service by selecting the calendar icon next to the date box. (shown circled in red below)

**NOTE:** If the member is a Coordinator for a project, or they are the project lead for the day a group of Master Naturalists worked on a specific project they will want to review
and complete the “Project Impact information” listed Service Project Coordinator (or their designee) for that specific project and date.

7. For the “Select the category/type of service performed on this project” questions you or the member may need to refer to the **TMN Activities Description Chart** for assistance in completing this question for the service project report and opportunity being submitted. This chart may also be found by clicking on the link at the bottom of the survey page. (see yellow circle above).

8. By clicking on OK, this submits the hours to the program administrator or to the approver for final review and approval. A notification will be sent to the approver. In the event a key stroke error may have taken place the approver would “reject” the information entered and ask that the information be re-entered for that project and that time period. Once you select OK you will get a new window acknowledging the
submittal of your report. You may have to scroll up within that new window to see the confirmation of your report. Hours submitted may be edited only until the approver has approved or rejected them.

9. The volunteer completes the fields given for each survey. By clicking on OK, this submits the hours to the program administrator or to the approver. A notification will be sent to the approver. The member will likely need to reference the Activities description chart listed on pages 15, 16, and 17 of this guide to complete the “Category/Type of service performed on this project” survey question.

**Note:** This Activities description chart is included in the Member’s Guide to entering hours.”
ASSIGN APPROVER

1. If the opportunity requires someone to approve hours for the assigned volunteers, the program administrator needs to set up approver(s) for the opportunity. The approver can be another volunteer or a TPWD employee.

2. In eCoordinator, click on the opportunities tab. Select an opportunity and click Edit.

3. Click on the Approvers tab.

Note: If there are volunteers that have signed up and approved for the opportunity their name will appear in the Available Approvers list. Any new approvers added to the system will appear in the “available approvers” window.

Select their name and click the right arrow to move their name to the Approvers for this opportunity list.

Note: There can be multiple approvers for the same opportunity. The first approver to review the hours for a volunteer can approve the hours. The other approvers will no longer be able to access the hours for the same volunteer and approve them once they are approved. The program administrator serves as the second level approver and can override what the approver has done.

If a new approver needs to be set up click the New button. (Keep in mind that approvers cannot approve their own submissions)

- Complete the contact information for the approver.
- Assign a User ID and Password. (The User ID must be at least 6 characters with one number. The first letter of their first name and full last name with a number on the end is recommended. The password should be a minimum of 8 characters)
- Send the approver an email with their User ID and Password with instructions on accessing the volunteer hours to approve.
- Click the box Can approve.
- Click Save Changes.
- Click Finish.

**Approver instructions:**
The approver will go to the volunteer home page.
Click the Approve Login button on the volunteer home page.
1. Their basic profile will open. Scroll to bottom of page to see a list of volunteers who have submitted hours.
2. Select the volunteer and click the button for approve or disapprove.
3. Log out when done.

**Note:** The volunteer has until December 31st, of the current year to submit their hours worked on the opportunity.

**Note:** Sometimes there are keystroke errors in hours submissions. In this case these hours can be disapproved by the approver and the volunteer must resubmit the hours. The program administrator can also approve the hours.

**FOLDER MANAGER**

The Folder Manager contains folders marked:

- **All Data**: queries all data in your folders. This will include all the data for your Division and the programs established within that Division.
- **Inbox**: This contains new records for example when a volunteer applies they will appear in your Inbox for opportunities you have created. (Master Naturalists should not need this for the pilot test)
- **My Data**: will display all opportunities you have created or volunteers who you have created or applied for opportunities you have created.
- **Published Opportunities**: Volunteer/Service Project Opportunities in this folder are published to the public (website.) If you select an opportunity a green arrow will appear pointing to the published folder. This means you can publish the opportunity. If the green arrow is red and pointing away from the published folder this means you can unpublish it from the website.
- **Global Publishing**: Volunteer Opportunities in this folder are published to the national organizations All for Good (http://www.allforgood.org/) and United We Serve (http://www.serve.gov/.) **Master Naturalist Projects SHOULD NOT be published to this.**
- **Recycle Bin**: Contains deleted records. If you accidentally delete a record, it can be found in the Recycle Bin and can be moved back to the appropriate folder. Once you delete a record in the Recycle Bin it is permanently deleted.
- **Arrows appear next to the folders.** A green arrow means the record is available for that folder. A red arrow means the record is currently in that folder.
VOLUNTEER ACTIVITY STATUS

- **Active**: A volunteer is currently active. i.e. signed up as a volunteer and submitting/reporting hours at the rate of at least one hour per year.

- **Inactive**: A volunteer is signed up but has not submitted hours over a period of time i.e. no hours have been submitted in over a year. This is left up to the program administrator to determine when their volunteers are inactive so if chapters have a more stringent ‘inactive’ policy than the state TMN program, this could be changed for your chapter.

- **Pending**: A volunteer has applied and has not been placed with an opportunity. The volunteer will also be pending until a Criminal Background Check (YPS/CBC) has been completed if it is required for the opportunity. (This will not apply to Master Naturalists for the purpose of this pilot test)

- **Not Eligible**: This status is for volunteers who have been “fired” 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.
CRIMINAL BACKGROUND CHECK (CBC)
For the purpose of this pilot test you can skip to another section or the Emailing Volunteers Section on page 56 as criminal background checks have already been completed for TMN members participating in this pilot test.

Volunteers are required to have a criminal background check run if they are assigned to work on opportunities involving one of the following:
- Working with youth 17 years of age or younger
- Access to TPWD and Texas AgriLife Extension equipment
- Handling money

There are many events that do not require a criminal background check such as Coastal Expo. TPWD employees are overseeing events like Coastal Expo and therefore volunteers who are helping are less of a liability to the agency. The volunteers in this example are helping under the direction of TPWD staff. Another scenario is if the volunteer is helping at a youth camp the volunteer may have a different level of access to youth and therefore would need a criminal background check run.

Note: If you have any questions regarding the CBC/YPS process, contact your Chapter’s County Extension Agent contact.

Important! Criminal background checks should be run every 3 years as per the Texas AgriLife Extension Service Master Volunteers Program’s policy for existing volunteers. It is the responsibility of the training class coordinators to work with the local County Extension Agent on running background checks and reports on new volunteers.

First Step:
1. Run a report on registered volunteers for a specific opportunity.
2. On the opportunities tab, make sure grid shows requested volunteers. Use Grid Settings to customize grid.
3. Select the opportunity with requested volunteers.
4. Click Reports in the menu.
5. Select Request report.
6. A request for reports window appears. Select the appropriate fields to display on report and click OK.
7. A PDF report will open. This report can be saved or printed. Use this report to create the CBC report.

Note: To modify the grid refer to the section on custom reports.

Second Step:
Create a CBC report in eCoordinator:
1. Make sure the Volunteer tab is selected.
2. For each volunteer, verify if they have a CBC on file and has it been run within the past 12 months to 36 months.
   a. Select the volunteer and click Edit.
b. Click on the User Defined tab.
c. Select Background Checks.
d. Look at the CBC fields to determine the date the last CBC was run.

3. Click on the All Data folder to get a list of new volunteers who signed up for open opportunities.
4. Click on Saved Grids and select Criminal Background Check.

   **Note:** Only those fields selected in the CBC Data Grid will appear.

**Important!** If the Criminal Background Check Report grid is not available you may have to recreate the grid. See the Custom Reporting section of this guide.

5. Select the volunteers who have signed up for an opportunity that requires a CBC. (Look at the field called Requested to Opp) Click in the box to the left of their name.
6. Click Reports in the menu.
7. Select Volunteer Data Grid.
   **Note:** The Volunteer Data Grid Report window will open.
8. Scroll to the bottom, select Report Format as Text (tab delimited).
9. Click OK.
   **Note:** A file download window will appear.
10. Click Save.
11. Select the folder and drive on the network where you want to save the report.
12. In the File Name field, enter the name of the file with .xls as the extension.
    **Example:** cbc_request_wildlife_volunteers.xls
13. Change Save As Type to All Files.
14. Click Save.
15. The download window will say download complete. Click Open.
16. Check your data. Close the file and save it for future reference on the project.
EMAILING VOLUNTEERS

The email function can be utilized to communicate with groups of volunteers/Master Naturalist members. 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. Another email may be sent to members who have signed up to work on a specific project letting them know that a meeting location has been changed, or with any specifics on how they should report their hours already worked, etc. The appropriate Program Administrator log in will be needed to complete this function.

1. From the Volunteer tab, first determine what group of volunteers/members you want to email.
2. Use the query line to narrow your grid results. You can also click on the grid settings to add additional columns to your grid to help with your search criteria.
3. Select the volunteer records in the grid by placing a check mark in the box to the left of their name. (There is a button in the menu to Select All or Unselect All if this applies.)
4. Click the Email button in the menu.

5. The Email window appears.
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. Enter the email address of the sender in the From field.
8. Enter the Subject of the Email and message.
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 the Attach File button.
11. If this is a routine email you want to send, enter the name of the email in the Save Email Template field. Put a check mark in the box if you want to “Make this Template available to other users of this account”. Click Save.

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

   **Note:** When using the eCoordinator for email, messages may get sent to the person’s junk 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 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.
RECOGNITION
In Samaritan, program administrators can keep track of volunteer recognition based upon a volunteers cumulative hours. For the Master Naturalist Program these increments include 250, 500, 1000, 2500 and 5000 hours of service. Fields provided in Samaritan range from 40 hours to 10,000. Any additional recognition awards such as years of service can be tracked in the history tab.

Important! You are unable to run a report on information entered in a volunteer’s history.

1. In eCoordinator, 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 Recognition in the group list.
5. Complete the appropriate fields for the hours of service.
6. On the Hours Awarded, select from the drop down list yes or no.
7. For the Hours Date field, enter the date the volunteer received the recognition.
8. In the Hours Awarded By field, enter the program administrator’s name providing the recognition.

Note: If the volunteer submitted hours for multiple programs, the program administrator that received the majority of the hours should present the recognition award.

Note: After 500 hours, the system will track every 250 hours.

9. Click Finish at the bottom of the page.
RESETTING 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. To reset a volunteer’s/member’s password go to the Personal tab of the volunteer’s profile.
2. On the Volunteer Login page they would click on the “forget your password” link.
3. The system will ask the volunteer to enter their first name, last name and email address.
4. If they receive the following message:

   This information cannot be found in the database.

5. The volunteer should contact the volunteer coordinator for the opportunity they are signing up.

   **Note:** The program administrator can reset their password and email it to the volunteer.

Volunteer Login

If you are already a TPWD volunteer, please log-in or
Apply to become a volunteer

User ID:

Password:

Log in or Forget your password?
REPORTING
Master Naturalists may get the most use out of the “Custom Reports” feature and the “Logged Data Survey Responses feature described on pages 61 and 62 respectively.

1. Samaritan has created standard reports.
2. From the Opportunity tab, select an opportunity.
3. Click the Reports button.

4. A drop down list of options will appear. Select one.
   - Opportunity Roster – Lists basic information about the opportunities selected.
   - Opportunity Report – Lists the details of each opportunity.
   - Approval Report – List of volunteers approved for opportunity.
   - Request Report – List of volunteers who have signed up for opportunity but are not yet approved.
   - Opportunity Slot Placements – List of volunteers for scheduled slot who are approved.
   - Opportunity Data Grid – List all data appearing on the grid for the selected opportunities.
   - Opportunity Schedule – List of schedules for the opportunity if scheduled slots are set up.

5. Each report can be saved as a PDF or text file (Excel) and emailed to the volunteer coordinators.
CUSTOM REPORTS (FOR TMN REPORTS)
The following steps walk you through how to customize the grid data to help you in generating reports for the TMN State Program Office. You can create several different grids by saving each search. The steps are the same for both Volunteer grids and Opportunity grids.

1. Click on the Volunteer tab or the Opportunity tab.
2. Click on the Grid Settings button.
3. The Grid Settings for Volunteers appears.

4. Choose from the available columns list on the left.
5. Use the arrows in the middle to move the column to the right or vice versa.
6. Use the Move Up or Move Down button to position the selected columns in the order in which you want them to appear.
7. Enter the name of the report in the Save As field. Click the Save button.

   Note: Put a check mark in the box below this field if you want to make the saved grid available to others within your division.

8. Click OK when done to return to the volunteer grid data.
LOGGED DATA (SURVEY RESPONSES)
This is where you can create custom reports for the TMN State Program Office on the data you gather from the volunteers/members and the service project opportunities they completed surveys for. Reports can include Volunteer hours, acreage, trail miles, advanced training, outreach contacts/attendee data etc.
1. Click the Opportunities tab.
2. Select a folder for the data you want to create the report.
3. Click the Log Book button.
4. Select from the drop down list.
   - Only selected Opportunities will produce a report on just one opportunity if you have a check mark next to one of the opportunities in the grid.
   - All Opportunities in Grid will produce a report for all opportunities in the grid you selected.
   - All opportunities in Account will produce a report for all opportunities for your division.
5. After you select one of the options, the eCoordinator Log Book System page appears.
6. Select the Start Date and End Date as the range for the data you want in the report.
7. In the Summarize By drop down box the system defaults to Opportunity Title. Select which item you would like to summarize by here.

Note: You can customize the data you want to appear on the report by clicking on the Grid Settings button. Follow similar steps as above for creating custom reports.
8. Select the opportunities to include in the report.
9. Click the Reports button and select Log Book Report. The following screen appears:

10. Under Print options select All rows from grid or only the selected rows.
11. Enter the Report Title.
12. If you want to exclude any columns put in a check mark in the box to the right of the column name.
13. For Report Format select Text (Tab delimited) (*.txt).
14. Click Ok.

15. Click Save in the File Download window.
16. Enter the File Name ending with a period and “.xls” in order to open your document in Excel.
17. Example: Log_Book_Report.xls
18. Select All Files for the Save as Type.
19. Select the appropriate directory to save your report.
20. Click Save.
21. The following screen should appear.

```
Download complete

Log_Book_Report.txt from ec.volunteersnow.com
Downloaded: 2.11KB in 1 sec
Download to: C:\Users\stone\Desktop\Log_Book_Report.txt
Transfer rate: 2.11KB/Sec
[ ] Close this dialog box when download completes
```

22. Click Open.
23. Note: You may have to select Open With to open your document using Excel.
HISTORICAL HOURS

1. An opportunity must exist in eCoordinator and the volunteer must be assigned to the
to the opportunity.
2. From the Opportunities tab or the Volunteer tab, select Log Book in the menu.
3. Select All Opportunities in Grid or All Volunteers in Grid.
5. If you are on the Opportunities tab the system will display a list of opportunities. If you are
   on the Volunteers tab the system will display a list of volunteers.
6. Select one and click OK.
7. If you receive the following message: No approved volunteers for selected opportunity then
   you must assign a volunteer to the opportunity.
8. If you receive the following message: No surveys for the selected opportunity then you
   must go to the set up of the opportunity and assign a survey.
9. Select the volunteer and opportunity you want to enter hours for. Then select the survey that
   is attached to the opportunity.

   Cane, Candy

10. You are taken to the survey. Enter the necessary fields.
11. Click OK.
12. The system returns you to the Log Book System window. You can view the logged data for the volunteer.

**Note:**
These hours can be approved by clicking on the Approval button in the menu.
The history can be emailed to the necessary parties.
There are a number of standard reports available or you can create a custom report by clicking the Reports button in the menu.
ATTACHMENTS

Program Administrators may want to upload attachments to the volunteer profile. The following steps will guide you through how to manage attachments.

1. From the Volunteer tab, select a volunteer and click the Edit button.
2. Click the Attachments tab.

![Attachments Tab]

**Note:** There are two different types of attachments: Photo and Document.

3. To upload a document, 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.

![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 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. Notice the References attachment appears.

13. Select the new attachment type and browse for your document.
14. Click the Upload button.
15. Click Finish when complete.

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.
TECHNICAL ASSISTANCE

Should you have difficulties or additional questions contact Michelle Haggerty, TMN State Program Coordinator, michelle.haggerty@tpwd.state.tx.us Phone: 830-896-2504

In the event Michelle is not available, please contact Richard Heilbrun, Conservation Outreach Programs Coordinator, Richard.heilbrun@tpwd.state.tx.us Phone: 210-688-6447