

VMS^{2.1}

Volunteer Management System

Administration Help Document

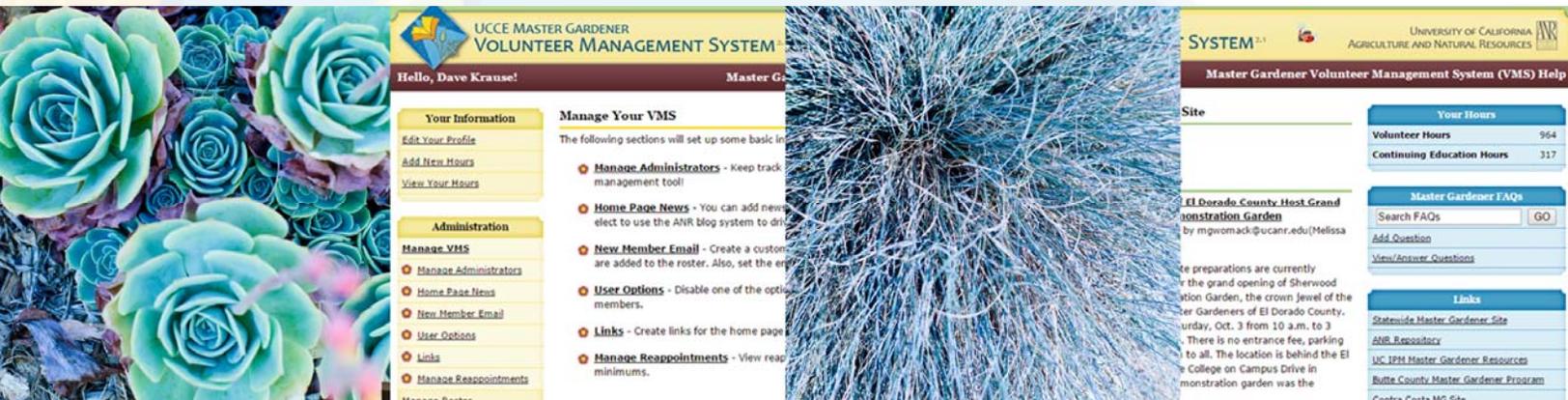


Table of Contents

- 1.0 Administration**5
 - 1.1 System Overview5
 - 1.2 Volunteers and VMS5
 - 1.3 Coordinators and VMS5
- 2.0 Accessing VMS**6
 - 2.1 The UC ANR Portal6
 - 2.2 Accessing VMS for the first time7
 - 2.3 Returning to VMS7
 - 2.4 Accessing VMS when you’ve lost or forgotten your password7
- 3.0 VMS Administration Site Overview**8
 - 3.1 The Banner8
 - 3.2 News8
 - 3.3 Left Navigation Bar9
 - 3.4 Right Information Panel 10
- 4.0 Manage VMS** 11
 - 4.1 Manage Access to VMS 11
 - 4.2 Manage Administrators 11
 - 4.3 Manage Home Page News 11
 - 4.4 Manage New Member Email 12
 - 4.5 Manage User Options 13
 - 4.6 Manage Links Administration 14
- 5.0 Manage Roster** 14
 - 5.1 Manage Interests 14
 - 5.2 Email Members 15
 - 5.3 Add a New Member 17
 - 5.4 Reinstate a Volunteer 17
 - 5.5 Change Volunteer Status 18
 - 5.6 Reset a Volunteer’s Password 19
- 6.0 VMS Calendar** 20

6.1 VMS Calendar Functions.....	20
6.2 Add a Calendar Event.....	21
6.3 Edit a Calendar Event.....	21
7.0 Manage Projects	22
7.1 VMS Project Categories	22
7.2 Add New Projects.....	23
8.0 Newsletter/Documents	24
8.1 Add New Group/Edit Group Settings.....	24
8.2 Add a New Newsletter Issue.....	24
8.3 Add a Document.....	25
8.4 View or Manage Subscribers.....	25
9.0 Hour Reports	26
9.1 Hour Reports.....	26
9.2 Expand Reports	27
10.0 Contact Reports	28
10.1 Show/Remove Hours	28
10.2 Demographic Categories	29
11.0 Reappointment	29
11.1 Reappointment	29
11.2 Reappointment Communications	30
11.3 Collect Digital Recertification or Resignation Documents from Volunteers.....	31
11.4 Resigning or Inactive Volunteers.....	32
11.5 Roster Cleanup, Final Numbers and Insurance Invoicing	32
12.0 Photo Albums	32
12.1 Create Photo Albums.....	32
12.2 Edit Photo Album.....	33
Appendix 1 - Frequently Asked Questions	34
Q1: How does a program coordinator send an email to new trainees to alert them of their new VMS accounts and/or to create a new password in VMS?.....	34
Q2: Is there information to give to new MG trainees on what to do when they receive the “Accessing Master Gardener System” email?	34

Q3: Is there any training for new users to VMS?	34
Q4: How can I reset a volunteer’s password in VMS?	34
Q5: How can I/coordinator give a new supervisor access to my county VMS?.....	34
Q6: Coordinator has a new training class that ends on Feb 20. They want them to sign all the appropriate forms electronically at this time. Can VMS be set up to “Manage Reappointments” so the “Sign Your Forms” flag goes only to the new class and not whole membership?.....	35
Q7: What forms are required to give trainees to sign?	35
Q8: Does a volunteer have to have an email address to access VMS?	35
Q9: When a volunteers transfers from one county UC MG Program to another and they are added to the roster their hours previously logged do not come over with them on VMS. Do I need to manually add those hours and activities?.....	35
Q10: How can MGs store photos that allows other MGs to be privately and securely stored and have access those photos for appropriate use?	35
Q11: When a MG resigns and their status is changed to inactive/resigned can they be deleted from the roster?	36
Appendix 2 - Reappointment Quick Tips and Frequently Asked Questions	36
Q1: What if my volunteer doesn’t have internet access/ wants a paper copy/ will be on vacation?.....	36
Q2: What if my volunteer does not recertify?	36
Q3: Can I delete a volunteer From VMS?.....	36
Q4: What if my County Director can’t find the MG Reviews link?	36

Volunteer Management System (VMS)^{2.1}

Administration Help Document

1.0 Administration

In this section you will learn about element of the home page, where they are located, and how they can be used:

- 1.1 System Overview
- 1.2 Volunteers and VMS
- 1.3 Coordinators and VMS

1.1 System Overview

The Volunteer Management System (VMS) is an online system developed by University of California Agriculture and Natural Resources (UC ANR) Communication Services and Information Technology (CSIT) team to assist volunteers in keeping accurate records of their volunteer activities. VMS allows volunteers to create a profile, log volunteer and continuing education hours, and report contacts. The program also provides a place for communication and collaboration within each county program with options to create calendar events, share photos and documents.

The system was designed to be:

- User-friendly for volunteers
- Modifiable by each county's Master Gardener Program's administrator, to provide a unique site
- Vigorous enough to retain record tracking functions required by UC and the Statewide Master Gardener Program.

1.2 Volunteers and VMS

Volunteers use VMS to:

- View their county's Event Calendar
- Volunteer for Events
- Record volunteer hours
- Record continuing education hours
- Report number of contacts made with the public
- View the roster of members
- Complete Reappointment
- Home Page News (the Blog) announcements and upcoming events are highlighted here
- Links and some documents

1.3 Coordinators and VMS

As a coordinator, VMS is the most helpful tool in your possession. You'll use it daily to accomplish the following tasks (and more!):

- View your roster of volunteers, including contact information and interests
- Manage roster through volunteer additions and status changes
- Communicate with volunteers through VMS email function

- Communicate with volunteers via home page news
- Create and manage volunteer projects
- Create and manage volunteer calendar events
- View volunteer hour reports
- View volunteer contact reports
- Upload documents, presentations, photos to share with group
- Manage and deploy an internal newsletter
- Manage annual reappointment process (occurs June-July every year)

2.0 Accessing VMS

In this section you will learn about:

- 2.1 The UC ANR Portal
- 2.2 Accessing VMS for the first time
- 2.3 Return to VMS
- 2.4 Accessing VMS when you've lost or forgotten your password

2.1 The UC ANR Portal

The Portal allows you to come to one place to access the UC ANR (University of California Division of Agriculture and Natural Resources) websites, utilities, and systems in which you are involved. Collaborative Tools, Surveys, Repository, ANR directory, IT help and VMS. The portal provides a simple yet secure way to get into important systems while only having to remember one username and password. All coordinators and UC Master Gardener Volunteers have portal accounts.



To log into the portal for the first time:

- Go to: <https://ucanr.edu/portal>
- Click on the 'New user? Forgot your password? Click here' button.
- Enter your e-mail address and click the button.
- If your e-mail address is in our system, an e-mail will be sent which contains a link to access the portal.
- Click on this link to enter the system.
- The link will only work one time. If you forget your password again, you will need to re-submit the access request.
- Once you are in the system, you can change your password.
- If you are NOT in the system, please contact your office manager or MSO.

If you are an ANR employee you must be in the ANR Directory to access the portal. First, check to see if you are in the [directory](#), it is possible that your e-mail may not match up with the directory listing.

If you are in the directory, you will be able to have account access information sent to you. If you are not in the directory, but feel that you should be. Contact your office manager or website liaison. Ask them to add you to the ANR directory. When you are added, you will receive portal access information.

2.2 Accessing VMS for the first time

Coordinator

1. New coordinators will need to be added to the VMS system by someone with administrator privileges in their county (likely a Farm Advisor, County Director, or other office staff) or [contact the statewide office](#) to gain access. Use your ucanr.edu email address when signing up for your staff account, which is especially important if you were formerly a volunteer.
2. Check with your County Director or local office administrator about getting a ucanr.edu staff email address.

Volunteer

1. Check your e-mail for a message with the subject line Accessing Master Gardener system. This e-mail will have been sent to the e-mail address given to coordinator or the statewide office. Click on the link in the text of the email (this link can only be used once).
2. The following page is displayed. Enter a new password.
 - The password must be at least 7 characters in length with no spaces and contain a number or special character. The password is “case sensitive,” i.e., upper and lower case letters are recognized by VMS.
 - Write down the password and keep it secure. No one including your coordinator or the statewide office will know it but you.
3. Retype the password exactly as you entered it in Step 2.
4. Select **Save Password**.
5. That county’s VMS home page is displayed. This home page is unique to that person, their hours and their county.

2.3 Returning to VMS

1. Access your Internet browser. Enter the web address for VMS <https://ucanr.org/mg> or access VMS through the portal <https://ucanr.edu/portal>
2. Enter the e-mail address and password you entered in Steps 1 and 2 above.

2.4 Accessing VMS when you’ve lost or forgotten your password

If you see this message when trying to access VMS, then either the email address or password were entered incorrectly.

Access Options

The Username or Password is not correct. Please try again.

Troubleshooting:

- Try re-entering the e-mail address and password being especially careful about using the correct upper and lower case letters in your password
- Make sure your **Caps Lock** is off.
- Clear the cookies on the computer <http://www.wikihow.com/Clear-Your-Browser's-Cookies>.

- When those fail select **Forgot Password?** And follow the prompts.

[Login](#) [Forgot Password?](#)

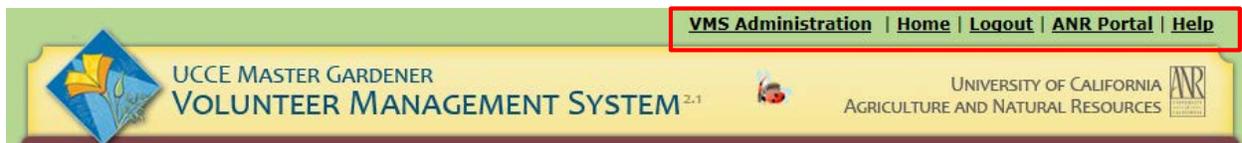
3.0 VMS Administration Site Overview

In this section you will learn about:

- 3.1 The Banner
- 3.2 News
- 3.3 Left Navigation Bar
- 3.4 Right Information Panel

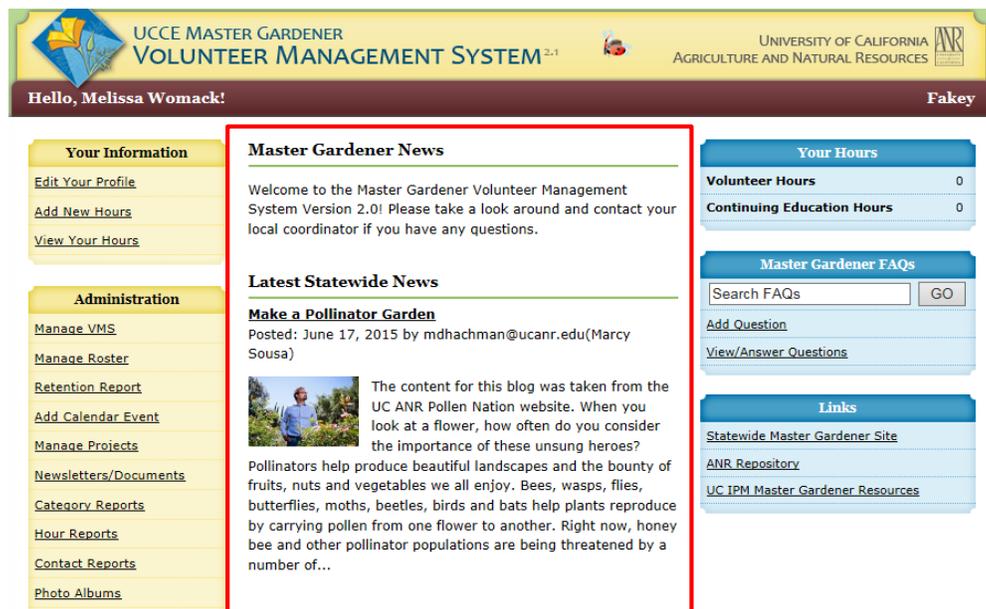
3.1 The Banner

Use the Banner located at the top of the page to navigate back to VMS home, ANR portal, help documents and log out.



3.2 News

The center column of the VMS homepage is the NEWS section and it includes the UC Master Gardener Statewide Blog and can be customized by each program to communicate with volunteers.



3.3 Left Navigation Bar

1. Your Information

Edit Your Profile- VMS profile should be reviewed and updated as necessary.

Add new hours- Qualifying MG volunteer service and continued education hours are recorded here.

View Your Hours- View your Volunteer Hour History for all time or a specific timeframe.

2. Administration

Manage VMS: The following sections will set up some basic information for your county VMS site.

- **Manage Administrators-** Keep track of who is managing what with the VMS admin management tool!
- **Home Page News-** You can add news to the county's VMS home page so each member can see it on their VMS home page, or you can elect to use the ANR blog system to drive your news and keep track of older news.
- **New Member Email-** Create a custom message that will go to new members after they are added to the roster. Also, set the email address for the sender of the messages.
- **User Options-** Disable one of the options and the feature will not be available to members.
- **Links-** Create links for the home page to anywhere you like.
- **Manage Reappointment-** View reappointment report and set program year and hour minimums.

Manager Roster: Add a new member, create mailing labels, and create excel spreadsheet of member roster.

- **Manage Interest-**Add, edit, or delete **Interest**.
- **Email Members-** Email volunteers by interest, project, group or email all volunteers.
- **Discussion list-** Displays who has access to Collaborative Tools for your county.

Retention Report- The retention report calculates the duration of an inactive and active volunteer's service, volunteers with under one year of service will not appear on this report.

Add Calendar Event-Use this feature to add an event to the Event Calendar.

Manage Projects- Add, view, deactivate and sort active and inactive projects.

Newsletter/Documents- Use this feature to add groups of newsletters or documents for volunteers to use or view. Add new issues, new documents and manage subscriber lists.

Category Reports- View all volunteer hours per Category for all time or a specific timeframe. The eleven categories are: Admin/Office, Booth Display, Demonstration Garden, Farm Advisor Research, Help Desk/Hotline, Mass Media/Communications, Master Gardener Continuing Education, Master Gardener Program Meeting, Mentoring, Public Education, and Sales/Fundraising.

Hour Reports- View mileage, continuing education and volunteer hours broken out per volunteer on the roster for all time or a specific timeframe. Expand the report to view the details of the hours captured per volunteer (i.e. Newsletter 4 hrs., Monthly Meeting 1.5 hrs.).

Your Information
Edit Your Profile
Add New Hours
View Your Hours

Administration
Manage VMS
Manage Roster
Retention Report
Add Calendar Event
Manage Projects
Newsletters/Documents
Category Reports
Hour Reports
Contact Reports
Photo Albums

Event Calendars
General Event Calendar

General Information
Member Roster
Discussion
Projects
Newsletters
Documents/Presentations

Contact Reports- View the demographics collected during volunteer activities for all time or a specific timeframe. Expand the report to show hours or project associated with those demographics.

Photo Albums- Create photo albums and upload picture to VMS for volunteers to view and preserve history.

3. Event Calendars

View all Events- Displays all events on a monthly calendar or list view. Click directly on the event to view detail and/or edit the event. To add events use the **Add Calendar Event** feature in the **Manage VMS** section. Note: When volunteers sign up for an event on the calendar it will automatically add it to the “Your Calendar” area on the right hand side of their VMS screen. The volunteer can have VMS remind them of the event; and volunteers have the option of downloading the event to their personal electronic calendar if it supports iCalendar (works with Outlook).

4. General Information

Depending on what is activated in VMS this section can include:

- Member Roster- View the member’s roster with the name, city, email and phone number of volunteers.
- Discussion- Select this option to jump to Collaborative Tools
- Projects-Displays the current list of projects
- Newsletter- Displays editions of the newsletter that were uploaded to VMS
- Document/Presentation-Displays a list of documents or presentations that were uploaded to VMS
- Photo Albums- Displays various photo albums to be viewed that were uploaded to VMS

3.4 Right Information Panel

1. **Your Hours Volunteer Hours-** Displays volunteer hours associated with your logon, if a coordinator is also a MG volunteer they should not log and record, report or volunteer for events as the VMS Administrator.

Your Hours	
Volunteer Hours	0
Continuing Education Hours	0

Continuing Education Hours- Displays continuing education hours associated with your logon, if a coordinator is also a MG volunteer they should not log and record, report or volunteer for events as the VMS Administrator.

Master Gardener FAQs	
<input type="text" value="Search FAQs"/>	<input type="button" value="GO"/>
Add Question	
View/Answer Questions	

2. **Your Calendar**

You may not see this feature as you don’t volunteer under your coordinator logon. This feature is displayed when volunteers sign up for an event on the calendar. The event is automatically added to the “Your Calendar” on the right hand side of their VMS screen.

3. **Master Gardener FAQs**

An online system to assist Master Gardener volunteers find answers to hotline/help desk questions. The FAQs system (Frequently Asked Questions) enable volunteers to provide feedback to other FAQs and the ability to post their own questions with descriptions and photographs. UCCE Master Gardeners can access the FAQs system through the (Volunteer management System) VMS, or through their UC portal.

Links
Statewide Master Gardener Site
ANR Repository
UC IPM Master Gardener Resources
A new tool! Master Gardener FAQs tutorials
Get Growing with Farmer Fred
GET YOUR CE HOURS HERE! UC TV MG
Lecture Series -
MG Calendar of Events - Statewide
Pest Mgt Guidelines for Home & Garden
Plant Right: Keep Invasive Plants in Check
Sutter-Yuba County Cooperative Extension
UC Davis Arboretum
UC Davis Weed ID tool

FAQs PowerPoint Presentation and FAQs Tutorial Videos are available at: http://ucanr.edu/sites/vmshelp/FAQ_System_on_the_VMS/

4. Links

This displays the links that are featured in the **Manage VMS, Links** feature. To add or edit links go to **Manage VMS, Links**.

4.0 Manage VMS

In this section you will learn how to:

- 4.1 Manage Access to VMS
- 4.2 Manage Administrators
- 4.3 Manage Home Page News
- 4.4 Manage New Member E-mail
- 4.5 Manage User Options
- 4.6 Manage Links Administration

4.1 Manage Access to VMS

The statewide office designates the **Owner** of VMS who has full access, can add volunteers to VMS and designate them specific **Administrative Rights** to areas of VMS as required.

4.2 Manage Administrators

The designated **Owner** of VMS has full access can **Manage Administrators** through the navigation panel in VMS.

To Manage Administrators:

- Log into VMS
- Select **Manage VMS** from the left navigation panel
- Select **Manage Administrators**
- Select **Add New Administrator** to add a new person and click the Admin Access you would like to give the user and select **Update Administrator**.
 - To edit access select the user you would like to edit and unclick the Admin Access you would like to remove and select **Update Administrator** or select **Remove Administrator** to remove all Admin Access the select **Update Administrator**.



Manage Your VMS

The following sections will set up some basic information for your site.

- **Manage Administrators** - Keep track of who is managing what with the VMS admin management tool!
- **Home Page News** - You can add news to each member's VMS home page, or you can elect to use the ANR blog system to drive your news and keep track of older news
- **New Member Email** - Create a custom message that will go to new members after they are added to the roster. Also, set the email address for the sender of the messages.
- **User Options** - Disable one of the options and the feature will not be available to members.
- **Links** - Create links for the home page to anywhere you like.
- **Manage Reappointments** - View reappointment report and set program year and hour minimums.

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- **New Member Email** - Create a custom message that will go to new members after they are added to the roster. Also, set the email address for the sender of the messages.

Edit Administrator

Select the administrator rights you would like to give to the user. If you would like to remove all rights, please click the "Remove Administrator" button.

Name	Lauren Snowden
Admin Access	Click any that apply
	<input type="checkbox"/> Roster
	<input type="checkbox"/> Projects
	<input type="checkbox"/> Calendar
	<input type="checkbox"/> Newsletters
	<input type="checkbox"/> Volunteer Hours
	<input type="checkbox"/> Photo Albums
	<input type="checkbox"/> Full Access (includes all admin functions)

4.3 Manage Home Page News

To customize the homepage news:

- Log into VMS
- Select **Manage VMS** from toolbar at left
- Select **Home Page News**

Note: You can put news about your group here, or use the UC ANR blog system to run your news. Using the UC ANR blog system will enable you to archive your news stories, post pictures and allow comments. If you are interested in using the UC ANR blog system, please [contact the statewide office](#).

If you do not want any news to display, remove any blog association, delete everything in the Front Page News text box and click "Save Information."

4.4 Manage New Member Email

New Member Email allows you to create a custom email message that is sent to new members after they are added to the roster and to members requesting a password reset.

- Log into VMS
- Select **Manage VMS** from toolbar at left
- Select **New Member Email**
- Customize the sender's email address and message as needed then click **Save Email Message**.

The screenshot shows a web interface with two main columns. The left column has a sidebar with 'Your Information' and 'Administration' sections. The 'Administration' section includes links for 'Manage VMS', 'Manage Administrators', 'Home Page News', 'New Member Email', 'User Options', 'Links', and 'Manage Reappointments'. The right column is titled 'Manage Your VMS' and contains a list of settings with descriptions: 'Manage Administrators', 'Home Page News', 'New Member Email', 'User Options', 'Links', and 'Manage Reappointments'.

Manage Email Message

This message will be included with emails sent to your new members. The sender's email address will show as the sender to members receiving the email.

Sender's Email Address	<input type="text" value="mgwomack@ucanr.edu"/>
Message	<div style="border: 1px solid black; padding: 5px; min-height: 100px;">Welcome to the UC Master Gardener Program!</div>
<input type="button" value="Save Email Message"/>	

4.5 Manage User Options

User Options allows you to manage the VMS options available to members.

- Log into VMS
- Select **Manage VMS** from toolbar at left
- Select **User Options**
- Select the option to **Enable** or **Disable** the options to which members will have access. The enabled will appear in the **Enabled** list, disabled in the **Disabled** list. The two lists complement each other; selecting an item will move that item from one side (enabled or disabled) to the other side.

Your Information

[Edit Your Profile](#)

[Add New Hours](#)

[View Your Hours](#)

Administration

Manage VMS

[Manage Administrators](#)

[Home Page News](#)

[New Member Email](#)

[User Options](#)

[Links](#)

[Manage Reappointments](#)

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- **User Options** - Disable one of the options and the feature will not be available to members.
- **Links** - Create links for the home page to anywhere you like.
- **Manage Reappointments** - View reappointment report and set program year and hour minimums.

Options For Volunteers

Select the option to "Enable" or "Disable" the option to which members will have access. The enabled options will appear in the **Enabled** list, disabled options in the **Disabled** list.

Enabled

[Edit Profile](#)

[Add/View/Edit Hours](#)

[CE Hours](#)

[Miles Driven](#)

[Population Served \(contacts\)](#)

[Population Served with Youth Breakout](#)

[Apply to Project](#)

[Member Roster](#)

[Email Members](#)

[Event Calendars](#)

[Discussion](#)

[Projects](#)

[Location \(Address\)](#)

[Newsletters/Documents](#)

[FAQs](#)

[Reappointment System](#)

Disabled

[Edit Profile](#)

[Title](#)

[Program](#)

[Member Profile Demographics](#)

[County Where You Live](#)

[Ethnicity](#)

[Gender](#)

[Occupation](#)

[Educators Only Please Select](#)

[Education](#)

[Date of Birth](#)

[Add/View/Edit Hours](#)

[Other Organization](#)

[Type of Project](#)

[County](#)

[Location \(Address\)](#)

[Comments](#)

4.6 Manage Links Administration

Links allows you to manage links for your county VMS home page that will displayed on every member's VMS home page.

- Log into VMS
- Select **Manage VMS** from toolbar at left
- Select **Links**
- Select **add a new link**
- Type in the name you want displayed for the link in **Link Name**.
- Type the web address in **Link URL** and select **Post Link**.

Check that the link works by going to the VMS home page and view the links on the right information panel.

Your Information
Edit Your Profile
Add New Hours
View Your Hours

Administration
Manage VMS
Manage Administrators
Home Page News
New Member Email
User Options
Links
Manage Reappointments

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- **Links** - Create links for the home page to anywhere you like.
- **Manage Reappointments** - View reappointment report and set program year and hour minimums.

Link Editor

Links will appear on every member's home page. You can click a link name to edit or delete the link.

You can also **add a new link**.

Links

- [Statewide Master Gardener Site](#)
- [ANR Repository](#)
- [UC IPM Master Gardener Resources](#)

Editing Link

Link Name	<input type="text" value="Local Water District"/>
Link URL	<input type="text" value="www.localwaterdistrict.org"/>
<input type="button" value="Post Link"/>	

5.0 Manage Roster

In this section you will learn how to:

- 5.1 Manage Interests
- 5.2 Email Members
- 5.3 Add a New Member
- 5.4 Reinstate a Volunteer
- 5.5 Change Volunteer Status

5.1 Manage Interests

The **List of Interest** is displayed in the profile of members to click what their areas of interest are when creating/editing their VMS profile. When looking for interested volunteers utilize this list to engage those who have listed interest in that particular topic.

To add, delete or view interests:

- Log into VMS
- Select **Manage Roster** from toolbar at left
- Select **Manage Interests**

- To add, select **Add New Interest**
- Type in the name of the **Interest** you want to add and select **Create Interest**
- To delete, select the interest to be deleted and select **Delete Interest**
- To view interested volunteers, select the interest you want to view and a list of interested volunteers will be displayed.

Edit An Interest

Interest Name

Interested Volunteers

The following volunteers have selected "Newsletter Articles" as an interest.

5.2 Email Members

Utilize this feature to email volunteers by interest, project, group or email all volunteers.

- Log into VMS
- Select **Manage Roster** from toolbar at left
- Select **Email Members**
- Select the appropriate boxes to direct your email to and select **Email by Interest or Group**
- Compose your email, attach file and make any changes to the list of recipients.
- When ready to send **Select Send Email**

<p>Your Information</p> <p>Edit Your Profile</p> <p>Add New Hours</p> <p>View Your Hours</p>	<p>Email Volunteers</p> <p>View Email History</p>							
<p>Administration</p> <p>Manage VMS</p> <p>Manage Roster</p> <p>Manage Interests</p> <p>Email Members</p> <p>Discussion List</p> <p>Retention Report</p> <p>Add Calendar Event</p> <p>Manage Projects</p> <p>Newsletters/Documents</p> <p>Category Reports</p> <p>Hour Reports</p> <p>Contact Reports</p> <p>Photo Albums</p>	<p>Event Calendars</p> <p>View All Events</p> <p>Advanced Diagnostic Plant Clinic</p> <p>Butchie's Pool Plant Sale</p> <p>Community Gardens Sign-up</p> <p>Fair Adventures Project</p>	<table border="1"> <thead> <tr> <th>List of Interests</th> <th>List of Projects</th> <th>List of Groups</th> </tr> </thead> <tbody> <tr> <td> <input type="checkbox"/> Bulbs <input type="checkbox"/> Farmer's Market <input type="checkbox"/> Foothill Gardening <input type="checkbox"/> Fruit & Nut Trees <input type="checkbox"/> Integrated Pest Management <input type="checkbox"/> Leo Chesney Center <input type="checkbox"/> Library Classes <input type="checkbox"/> Native Plant Gardening <input type="checkbox"/> Newsletter Articles <input type="checkbox"/> Office <input type="checkbox"/> Other? <input type="checkbox"/> Plant Clinics <input type="checkbox"/> Program Planning <input type="checkbox"/> Roses <input checked="" type="checkbox"/> School Gardens <input type="checkbox"/> Scrapbook <input type="checkbox"/> Seasonal Events <input type="checkbox"/> Website </td> <td> <input type="checkbox"/> Advanced Pest Diagnostic Clinic <input type="checkbox"/> AgVentures - SY Fair <input type="checkbox"/> Butchie's Pool <input type="checkbox"/> Community Service <input type="checkbox"/> Continuing Education Credits/Monthly Meetings <input type="checkbox"/> E-Mail Bureau <input type="checkbox"/> Farm Day <input type="checkbox"/> Farmers' Market <input type="checkbox"/> Home Gardeners Workshop <input type="checkbox"/> Lectures, Workshops, And Community Events <input type="checkbox"/> Marysville Community Garden <input type="checkbox"/> MG Advertisements <input type="checkbox"/> MG Program Administration <input type="checkbox"/> New MG Training <input type="checkbox"/> Newsletter <input type="checkbox"/> Office Duty <input type="checkbox"/> Office Special Projects <input type="checkbox"/> Plant Clinics <input type="checkbox"/> Sierra Foothill Research And Extension Center <input type="checkbox"/> Volunteer Management System (VMS) <input type="checkbox"/> Website/Social Media <input type="checkbox"/> Yuba City Home Show <input type="checkbox"/> Yuba County Jail </td> <td> <input type="checkbox"/> Email all volunteers Email Only: <input type="checkbox"/> Trainee <input type="checkbox"/> First-Year Master Gardener <input type="checkbox"/> Master Gardener <input type="checkbox"/> Gold Badge <input type="checkbox"/> Limited Active <input type="checkbox"/> Inactive/Resigned <input type="checkbox"/> Internal Administration <input type="checkbox"/> UC Staff <input type="checkbox"/> Honorary <input type="checkbox"/> Unappointed Members </td> </tr> </tbody> </table>	List of Interests	List of Projects	List of Groups	<input type="checkbox"/> Bulbs <input type="checkbox"/> Farmer's Market <input type="checkbox"/> Foothill Gardening <input type="checkbox"/> Fruit & Nut Trees <input type="checkbox"/> Integrated Pest Management <input type="checkbox"/> Leo Chesney Center <input type="checkbox"/> Library Classes <input type="checkbox"/> Native Plant Gardening <input type="checkbox"/> Newsletter Articles <input type="checkbox"/> Office <input type="checkbox"/> Other? 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			<p><input type="button" value="Email by Interest or Group"/></p>					

Email Volunteers

Compose your email message and make any changes to the list of recipients here.

Recipients

Interests included: School gardens

Please deselect any volunteers who should NOT receive this email. - Uncheck All

Email Message

<p>Subject</p> <input type="text"/>	<p>Message</p> <div style="border: 1px solid gray; padding: 5px;"> <p>B <i>I</i> \times_2 \times^2 </p> </div> <p style="text-align: right;">Words: 0</p>
<p>Attachment (optional)</p> <input type="button" value="Browse..."/>	
<p>Copy Me</p> <input type="checkbox"/> Send me a copy of the email	
<p><input type="button" value="Send Email"/></p>	

5.3 Add a New Member

To add a new volunteer to VMS:

- Log into VMS
- Select **Manage Roster** from toolbar at left
- Select **Add a New Member** from the top navigation bar

To prevent duplicate user accounts, you will be prompted to start a search the user database (email or last name) for the person you want to add to the program roster.

- When **User not Found** is displayed select **Create a New Member**
- **Edit Member Profile** will be displayed Enter **First Name, Last Name and Email Address** where indicated and select **Update Profile**, to create **New User Account**
- New members will receive an email with access instructions to VMS if the feature is turned on. The feature can be toggled on and off from the **Existing User Check** screen.

Your Information

- Edit Your Profile
- Add New Hours
- View Your Hours

Administration

- Manage VMS
- Manage Roster**

Manage Member Roster

Add a New Member | Create Mailing Labels | Create Excel | Hide Inactive Members

Edit Volunteer	Send Login Procedure	Update	Status
Hours / Projects	Apgar_Test abd@yahoo.com	6/24/15	Master Gardener
Hours / Projects	Apgar_Test apgar:test-9153379	6/24/15	Gold Badge
Hours / Projects	Dragoon_Leigh ladragoon@ucanr.edu	5/4/15	Master Gardener
Hours / Projects	Gable_Missy mjgable@ucanr.edu	3/5/14	Master Gardener

Add Member To Roster

1. Existing User Check

First, to prevent duplicate user accounts, search the user database for the person you want to add to the program roster.

New members will receive an email with access instructions. [Turn this feature off.](#)

Find Member [Apgar] [Search] [Clear Search]

User not Found

[Create a New Member]

5.4 Reinstate a Volunteer

A volunteer has thirteen months to seek reinstatement and return to Active Master Gardener Status. See the [UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Chapter 3 Volunteer Status, Section VIII. Reinstatement. To reinstate a member on VMS:

- Log into VMS
- Select **Manage Roster** from toolbar at left
- Select **Add a New Member** from the top navigation bar
- Search the user database (email or last name) for the person you want to add to the program roster
- When you see the person you want to reinstate select **Reactivate** next to their name
- Update their information as needed and select **Update Profile**

Add Member To Roster

1. Existing User Check

First, to prevent duplicate user accounts, search the user database for the person you want to add to the program roster.

New members will receive an email with access instructions. [Turn this feature off.](#)

Find Member [Apgar] [Search] [Clear Search]

We have found matches in our database!

Test Apgar (No Email) Not an active member	Reactivate
Test Apgar (No Email) Already an active member of this group	Edit User

Don't see the member listed?

[Create a New Member]

- To send the reactivated member an email with access instructions to VMS
 - Select **Manage Roster** from toolbar at left and select their email address under the title **Send Login Procedure**

Note: The volunteer and continuing education hours will automatically repopulate with the members profile only for those items (e.g. continuing education, volunteer hours) associated with that county.

Manage Member Roster

[Add a New Member](#) | [Create Mailing Labels](#) | [Create Excel](#) | [Hide Inactive Members](#)

Edit Volunteer	Send Login Procedure	Update	Status
Hours / Projects Apgar, Test	abd@yahoo.com	6/24/15	Master Gardener
Hours / Projects Apgar, Test	apgar-test-9153379	6/24/15	Gold Badge
Hours / Projects Dragoon, Leigh	ladragoon@ucanr.edu	5/4/15	Master Gardener
Hours / Projects Gable, Missy	mjgable@ucanr.edu	3/5/14	Master Gardener
Hours / Projects Krause, Dave	djkrause@ucanr.edu	3/5/14	UC Staff
Hours / Projects Snowden, Lauren	llsnowden@ucanr.edu	6/2/15	Trainee
Hours / Projects Womack, Melissa	mgwomack@ucanr.edu	5/4/15	Inactive/Resigned
Hours / Projects Womack, Melissa		4/23/15	Trainee

5.5 Change Volunteer Status

To change the status of a volunteer

- Log into VMS
- Select **Manage Roster** from toolbar at left
- Select the volunteer and in the **Volunteer Status** section choose the appropriate status from the dropdown menu and select **Update Profile**
- Status Options: Trainee, First-Year Master Gardener, Master Gardener, Gold Badge, Limited Active, Inactive/Resigned, Internal Administration, UC Staff, Honorary

Edit Member Profile - Last Updated 11:29 AM On 4/20/2015

[View Reappointment Terms and Conditions](#)

Name	Lauren Snowden
Profile Editing	UC ANR staff details cannot be edited here
Volunteer Status	Inactive/Resigned ▼

Status Definitions:

1. **Trainee**- is an approved enrolled volunteer actively participating in the UCCE MGP training program. A Trainee immediately becomes a First-Year Master Gardener by attending the mandatory trainings and passing the qualifying exam. [See the UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Chapter 3 Volunteer Status, Section III. Training (“MG Volunteer Trainee” Status)
2. **First-Year Master Gardener**- is a trainee who has attended the mandatory trainings and passed the qualifying exam and is now a “certified” UC Master Gardener. [See the UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Chapter 3 Volunteer Status, Section V. Appointment (First Year of UCCE MGP Service)

3. **Master Gardner-** is a MG volunteer in good standing who has completed the normal UC Master Gardener Program volunteer service requirements and completed reappointment annually. [See the UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Chapter 3 Volunteer Status, Section VI. Reappointment (Second and Subsequent years of UCCE MGP Service)
4. **Gold Badge** – is a MG volunteer who has completed a minimum of one thousand (1,000) hours of service in good standing. [See the UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Chapter 3 Volunteer Status, Section XII. MG Volunteer Recognition
5. **Limited Active-** is a MG volunteer who has requested to be put on Limited Active status to maintain their standing as active during a period in which they are unable to complete the normal UC Master Gardener Program volunteer service requirements due to major difficulties. (May not exceed one year). [See the UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Chapter 3 Volunteer Status, Section XI. Limited Active Status Reappointment
6. **Inactive/Resigned-**
Inactive, is an MG volunteer who does not fulfill the reappointment requirements, and cannot participate in UCCE MGP activities. [See the UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Chapter 3 Volunteer Status, Section VII. Inactive Active Status.

Note: If status is changed to inactive/resigned the MG volunteer still has access to the Collaborative Tools System (CTS) and will have to be managed manually in CTS to remove them from the list.

Resigned, is an MG volunteer who does not request and receive reinstatement after becoming inactive for thirteen months or has independently chosen to resign from the UCCE MGP at any time.

7. **Honorary-** is an MG volunteer who has supported the principles and goals of the UCCE MGP and who has made outstanding contributions to the UCCE MGP and is recognized by the County Director as an Honorary MG. [See the UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Chapter 3 Volunteer Status, Section XII. MG Volunteer Recognition
8. **Internal Administration-** VMS status reserved for internal staff and program developers, ie: CSIT
9. **UC Staff-** VMS status reserved for University of California or University of California Cooperative Extension staff.

5.6 Reset a Volunteer's Password

To reset a volunteer's password:

- Log into VMS
- Select **Manage Roster** from toolbar at left

- Select the volunteer and in the **Change Password** section input the new password and select **Update Profile**

Change Password

Enter Password

Passwords must be at least 7 characters in length with no spaces and contain a number or special character.

6.0 VMS Calendar

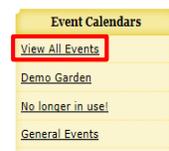
In this section you will learn how to:

- 6.1 VMS Calendar Functions
- 6.2 Add Calendar Event

6.1 VMS Calendar Functions

The VMS calendar includes scheduled activities and the volunteers who've signed up online to attend each event. Use the dropdown menu at the top of the calendar to customize the view (Monthly View or List View/Admin View) and change the month and year. To access the calendar:

- Log into VMS
- Select **View all Events** from toolbar at left, this displays all upcoming events
 - Select an event to reveal detailed information and to see who has volunteered
 - Edit the event if necessary by selecting **Edit This Event** which will direct you to the **Calendar Event Editor**
 - Edit the event as necessary and select **Save Event Information**



Note: When MGs volunteer for an event there is an option to generate an electronic calendar reminder and/or an email reminder. Volunteers can also **Un-volunteer** from an event they have signed up for (this also removes any reminders they may have set up)

6.2 Add a Calendar Event

Only Administrators of VMS with assigned **Administrative Rights** to the **Calendar** can add an event. Events can be entered as a one-time occurrence or set up on a recurring schedule. The information will be displayed in the calendar for all volunteers to view. This may be used to have volunteers sign up for events or be listed for information only purposes. To add an event to the calendar:

- Log into VMS
- Select **Add Calendar Event** from toolbar at left
- The **Calendar Event Editor** page will be displayed.
- Enter the event details and select **Save Event Information**

6.3 Edit a Calendar Event

To edit a calendared event:

- Log into VMS
- Select **View all Events** from toolbar at left, this displays all upcoming events
 - Select the event you want to edit
- Select **Edit This Event**
- The **Calendar Event Editor** page will be displayed
- Edit the event as necessary and select **Save Event Information**

Your Information
Edit Your Profile
Add New Hours
View Your Hours

Administration
Manage VMS
Manage Roster
Retention Report
Adding Calendar Event
Manage Projects
Newsletters/Documents
Category Reports
Hour Reports
Contact Reports
Photo Albums

Event Calendars
View All Events
Demo Garden
No longer in use!
General Events

General Information
Member Roster
Discussion
Projects
Newsletters
Documents/Presentations
Photo Albums

Calendar Event Editor

Event Name

Select Calendar

Or Create New Calendar

Project
Only select if you want event to display on the project page.

Event Coordinator

Email Coordinator Yes No
If yes is checked an email will be sent to the coordinator when a volunteer signs-up or removes name from event.

Start Date

End Date

Occurrence Type

Daily Occurrences Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Weekly Occurrences Every 1 week(s), beginning with start date.

Monthly Occurrences OR Repeat based on Start Date

All Day Event Check this box if your event runs all day

Event Times TO

Sign-Ups people can sign-up for this event.

Display Signups on calendar Yes No

Block Sign-up days before event. This will also prevent members from unvolunteering.

Location

Address

Event Website Address

Contact Information

Event Description

Update

File Attachments

New File Name

Find New File

7.0 Manage Projects

In this section you will learn how to:

7.1 VMS Project Categories

7.2 Add New Projects

7.1 VMS Project Categories

There are 11 pre-defined categories in VMS that allow for consistent, compelling and accurate reporting across the statewide program. The data collection is important for program sustainability and is a great tool to share relevant information with stakeholders at the community, county, state and federal level.

When creating a new project, simply select the category from the dropdown menu and save.

1. **Admin/Office**- Any projects that fosters the administration of the UC Master Gardener program. Including board (or other leadership structure) meetings, and sub-committee meetings that do not belong in another category. May also include office duties completed by a volunteer at the request of program coordinator or UCCE staff person.
2. **Booth Display**- Includes projects in which UC Master Gardeners represent the program, UCCE, or UC ANR at an event with a larger focus. Includes, but not limited to, preparation, attendance, or clean up from the following: farmer's markets, county fair booth, table at community events, home and garden show, etc.
3. **Demonstration Garden**-Includes, but is not limited to: school gardens, community gardens, public landscaping projects.
4. **Farm Advisor Research**-Any research done on behalf of a UCCE farm advisor, specialist or the statewide office. Includes PlantRight Nursery Survey.
5. **Help Desk/ Hotline**-Includes any activity in which UC Master Gardeners answer questions from the public about home horticulture and/or pests, typically on an individual basis. Hotlines, Helplines, answering "helpline" emails or phone calls, plant clinics, water walks, etc.
6. **Mass Media/ Communications**-Any communications intended for an external audience. Including, but not limited to, the development of material such as: flyers, newspaper articles, press releases, social media, blog posts, newsletters, direct mail, etc.
7. **Master Gardener Continuing Education**-Any program coordinator-approved continuing education opportunities.
8. **Master Gardener Program Meeting**- Internal meetings held for UC Master Gardener volunteers.
9. **Mentoring**- Includes projects that cater to the internal development of UC Master Gardener volunteers and program leadership. Includes committees that facilitate new class trainings.
10. **Public Education**- Any project in which a Master Gardener is educating the public (usually more than one at a time) on home horticulture topics. Workshops, classes, seminars, demonstrations, etc.

11. **Sales/Fundraising-** Any project that leads to the sale of a product or fundraising opportunity. Examples: developing a county calendar for sale; plant propagation and maintenance for a plant sale; working on logistics and/or physically working in the garden preparing for a garden tour.

7.2 Add New Projects

To view current projects or add a new project

- Log into VMS
- Select **Manage Projects** from toolbar at left
- Select **Add New Project**
- Enter: **Project Name**, select **Project Category**, **Project Location**, **Project Description** **Project Information**, select a **Project Contact**, **Number of Volunteers Needed** and select **Create Project**
- The project is listed in the **General Information** toolbar at left under **Projects**
- The project may be edited or deactivated as needed by accessing **Managing Project**

The screenshot displays the 'Manage Projects' interface. On the left, there are two vertical navigation menus: 'Your Information' (with links for 'Edit Your Profile', 'Add New Hours', and 'View Your Hours') and 'Administration' (with links for 'Manage VMS', 'Manage Roster', 'Retention Report', 'Add Calendar Event', and 'Manage Projects', which is highlighted with a red box). The main content area is titled 'Manage Projects' and includes a 'Start Date' and 'End Date' filter with 'Submit' and 'Create Excel' buttons. Below this is the 'Active Projects' section, featuring a table with columns for 'Project Name', 'Volunteers', 'Hours', and 'Slots'. A single project named 'Tester' is listed with 0 volunteers, 5 hours, and 500 slots, and a 'Deactivate Project' button. To the right of the table are links for 'Add New Project' (highlighted with a red box) and 'View Inactive Projects'. Below the table is the 'Edit Project Information' form, which includes fields for 'Project Name', 'Project Categories' (set to 'Admin/Office'), and 'Project Location'. It also features two rich text editors for 'Project Description' and 'Project Information', each with a 'Words: 0' counter. At the bottom of the form are fields for 'Project Contact' (a dropdown menu), 'Email Contact' (with radio buttons for 'Yes' and 'No'), and 'Number of Volunteers Needed' (a text input field), followed by a 'Create Project' button.

8.0 Newsletter/Documents

In this section you will learn how to:

- 8.1 Add New Group/Edit Group Settings
- 8.2 Add new Newsletter Issue
- 8.3 Add a Document
- 8.4 View or Manage Subscribers

8.1 Add New Group/Edit Group Settings

Add groups of newsletters or documents for volunteers to use or view. Before you can upload newsletters or documents you must **Add New Group**.

- Log into VMS
- Select **Newsletters/Documents** from toolbar at left
- Select **Add New Group**
- **Edit Page** will be displayed, enter: **Group Name, Description, Sender Email Address**, select **Group Type (Newsletter, Documents, Archived)**, check or uncheck **Newsletter Subscription** and **Add Volunteers** then select **Save Group Information**

Note: VMS will email out all subscribers the newsletter, be sure the check the box **Newsletter Subscription** to activate this feature. Section 8.3 *View or Manage Subscribers* to manage who receives the notifications.

8.2 Add a New Newsletter Issue

Before you can upload newsletters or documents you must **Add New Group**, [see Section 8.1 Add New Group/Edit Group Settings](#) on how to add a new group.

To add new issues

- Log into VMS

The screenshot shows the 'Manage Newsletters And Documents' interface. On the left, a sidebar menu has 'Newsletters/Documents' highlighted with a red box. The main content area has 'Add New Group' highlighted with a red box. Below this are sections for 'Newsletter Groups', 'Document Groups', and 'Archived Groups', each with a 'List of...' header and a message indicating no items are available.

Edit Page

[Return to Main List](#)

Group Name

Description

Sender Email address

Group Type Newsletters Documents Archived

Newsletter Subscriptions Checking box will allow visitors to get a reminder every time you post a new document in this group. This is highly recommended for newsletters.

Add Volunteers This will add all volunteers to subscriber list.

Manage Newsletters And Documents

[Add New Group](#)

Newsletter Groups

List of Newsletter Groups

Test Newsletter [View Subscribers](#) [Add New Issue](#)

Document Groups

List of Document Groups

Test Document [Add New Document](#)

Archived Groups

List of Archived Groups

Test Archive [View Subscribers](#) [Add New Issue](#)

- Select **Newsletters/Documents** from toolbar at left
- Select **Add New Issue** next to the group you want the document to be housed in
- **Add New Issue** page will be displayed, enter: **Newsletter Issue**, **Description of Newsletter Issue**, and select **Browse** to find the file to be uploaded and select **Upload Newsletter Issue**

Note: For easy viewing by multiple users with different computers and programs convert newsletters to PDF files before uploading (Portable Document Format).

8.3 Add a Document

- Log into VMS
- Select **Newsletters/Documents** from toolbar at left
- Select **Add New Document** next to the group you want the document to be housed in
- **Add New Document** page will be displayed, enter: **Document Name**, **Description of Document**, and select **Browse** to find the file to be uploaded and select **Upload Document**

8.4 View or Manage Subscribers

Volunteers may subscribe to Newsletters and Archived Document through the left navigation panel **Newsletters Documents/Presentations**.

To view and manage these subscribers:

- Log into VMS
- Select **Newsletters/Documents** from toolbar at left
- Select **View Subscribers** next to the group you want to view the subscribers for
- Manage subscribers by clicking their names to move them from one list to the other.
 - To add recently added volunteers to the subscriber list select **Add all current volunteers to list**

- If the check box **Newsletter Subscription** was selected when adding the group the subscribers of that group will receive an email notification with the subject line “Group Name” Newsletter subscription.

Note: Only volunteers with an email address will be added to the list.

Test Newsletter Subscribers

[Return to Main List](#) | [Add all current volunteers to list](#) | [Edit Group](#)

You can manage members by clicking their names to move them on and off of the subscriber list. Please note, members that are “unsubscribed” may have requested this status. You may want to contact a member prior to restoring a subscription.

Subscribed - Subscribe All	Unsubscribed - Unsubscribe All
Dragoon, Leigh (ladragoon@ucanr.edu)	Snowden, Lauren (lsnowden@ucanr.edu)
Gable, Missy (mjgable@ucanr.edu)	
Krause, Dave (djkrause@ucanr.edu)	
Womack, Melissa (mgwomack@ucanr.edu)	

9.0 Hour Reports

In this section you will learn how to:

- 9.1 Hour Reports
- 9.2 Expand Reports
- 9.3 Summary Report Administration

9.1 Hour Reports

The **Hour Reports** display all Volunteer Hours for all time or a time frame you designate. Use this report throughout the year to check on the status of volunteer hours and continuing education credit. This is also a good indicator on whether or not volunteers are entering their hours into VMS.

- Log into VMS
- Select **Hours Report** from toolbar at left
- To designate a specific time frame enter a **Start Date**, **End Date** and select **Submit**.

Your Information

[Edit Your Profile](#)

[Add New Hours](#)

[View Your Hours](#)

Administration

[Manage VMS](#)

[Manage Roster](#)

[Retention Report](#)

[Add Calendar Event](#)

[Manage Projects](#)

[Newsletters/Documents](#)

[Category Reports](#)

[Hour Reports](#)

[Contact Reports](#)

[Photo Albums](#)

Volunteer Hours Report

[Expanded Report](#) | [Show Removed Volunteers](#)

Start Date: **End Date:** [Submit](#) [Create Excel](#)

Volunteer		Mileage	C.E.	Vol
Total:		84123	6,281.55	48,564.15
Anthony Abel	Inactive/Resigned	5514	132.5	759.5
Lynda Alvarez	Master Gardener	1014	20.5	95.5
Cathy Ansel	Limited Active	50	11	69.5
Dale Ansel	Limited Active	0	15	155
Matt Benevedes	First-Year Master Gardener	424	112	13
Joyce Bernier	Master Gardener	398	158	503.25
Claudia Beymer	Master Gardener	4300	106	208.5
Terri Bishop	Master Gardener	5892	112	436.5
Laurie Bishopp	First-Year Master Gardener	0	0	5
Margaret Blood	Master Gardener	1256	76	110

- Select **Create Excel** to export the hour report to **Excel** where it can be sorted and manipulated to mine data that you may need.

1	2	3	4	5	6	7
LASTNAME	FIRSTNAME	CITY	EDHOURS	VOLCHOURS	STATUS	MILEAGE
Abel	Anthony	Valley Springs	3.5	11.5	Inactive/Resigned	48
Alvarez	Lynda	Arnold	5.5	15.5	Master Gardener	60
Amel	Cathy	McKellum Hill			Limited Active	2012
Amel	Dale	McKellum Hill			Limited Active	2012
Barbora	Barbara				Inactive/Resigned	
Barnes	Mart	Valley Springs	112	19	19th Year Master Gardener	424
Benton	Suey				Inactive/Resigned	2013
Bentley	Joyce		18.5	29	Master Gardener	18
Beymer	Clayton	Arnold	16	24.5	Master Gardener	1024
Bibbs	Terri	Mountain Ranch	26	112.5	Master Gardener	1679
Bishop	Laura	Mountain Ranch	0	4	4th Year Master Gardener	0
Blood	Margaret	McKellum Hill			Master Gardener	2012
Bonwick	Don	Maple	2	21	Master Gardener	60
Bosses	Jeanne	Maple			Inactive/Resigned	2013
Bradford	Penny	Mountain Ranch			Inactive/Resigned	2012
Branch	Don	Angels Camp	72.5	29	19th Year Master Gardener	1819
Brown	Lynn	West coast	2	42	Master Gardener	0
Bruchs	Doree	Angels Camp			Inactive/Resigned	2013
Burns	Marnah	Valley Springs	6.25	10	Master Gardener	49
Carrasco	Don	Valley Springs			Inactive/Resigned	
Chesson	Diane	Angels Camp	11.5	29	Master Gardener	746
Clark	Gregory	San Antonio	0	20.75	19th Year Master Gardener	48
Cleveland	Erin	Houston			J.C. Staff	
Colman	Christine	San Antonio	0	9.5	Master Gardener	0

9.2 Expand Reports

The **Hour Reports** can also be expanded by selecting the **Expanded Report** option near the top of the Volunteer Hours Report. The **Expanded Report** will show all activities for each volunteer that make up the Volunteer Hours Report.

- Log into VMS
- Select **Hour Report** from toolbar at left
- To designate a specific time frame enter a **Start Date**, **End Date** and select **Submit**.

Your Information

[Edit Your Profile](#)

[Add New Hours](#)

[View Your Hours](#)

Administration

[Manage VMS](#)

[Manage Roster](#)

[Retention Report](#)

[Add Calendar Event](#)

[Manage Projects](#)

[Newsletters/Documents](#)

[Category Reports](#)

[Hour Reports](#)

[Contact Reports](#)

[Photo Albums](#)

Volunteer Hours Report

Expanded Report [Show Removed Volunteers](#)

Start Date: End Date:

Volunteer Hours Report

Total: [Summary Report](#)

Author: Start Date: End Date:

Volun	Volunteer Hours Report		
Total:	Summary Report		
Anthony	Anthony Abel	Mileage	C.E.
Matt B	Total:	48	1.50 11.50
Joyce I	12/12/2014 Board Activity	Admin/office	0 0 3.5
Claudi:	12/12/2014 Board Activity	Admin/office	0 0 3
Terri B	9/10/2014 Board Meeting	Admin/office	24 0 2.5
Laurie	8/20/2014 General Meeting	Master Gardener Program Meetings	24 1.5 2.5
Don B:	Total:	48	1.50 11.50
Cora B	Lynda Alvarez	Mileage	C.E.
Lynn E	Total:	60	5.50 15.50
	6/27/2015 Open Garden Day	Demonstration Garden	60 0 3
	6/16/2015 Monthly Meeting	Master Gardener Program Meetings	0 0 2.5
	6/16/2015 On Line Scavenger Hunt #13 100%	Master Gardener Continuing Education	0 1 0

- Select **Create Excel** to export the hour report to **Excel** where it can be sorted and manipulated to mine data that you may need.

NAME	DATE	ACTIVITY	PROJECT	VOLHOURS	EDHOURS	STATUS	MILEAGE	STARTED
Abel, Anthony	8/20/2014	General Meeting	Master Gardener Program Meetings	2.5	1.5	Inactive/Resigned	24	2010
Abel, Anthony	9/10/2014	Board Meeting	Admin/office	2.5	0	Inactive/Resigned	24	2010
Abel, Anthony	12/12/2014	Board Activity	Admin/office	3.5	0	Inactive/Resigned	0	2010
Abel, Anthony	12/12/2014	Board Activity	Admin/office	3	0	Inactive/Resigned	0	2010
Alvarez, Lynda	8/19/2014	General Meeting	Master Gardener Program Meetings	1	1	Master Gardener	0	2010
Alvarez, Lynda	8/19/2014	Visiting Mickelson School	Master Gardener Continuing Education	0	1	Master Gardener	0	2010
Alvarez, Lynda	10/21/2014	General Meeting	Master Gardener Program Meetings	1	1.5	Master Gardener	0	2010
Alvarez, Lynda	10/21/2014	Natives	Master Gardener Continuing Education	2	0	Master Gardener	0	2010
Alvarez, Lynda	1/20/2015	General Meeting	Master Gardener Program Meetings	2	0	Master Gardener	0	2010
Alvarez, Lynda	1/20/2015	Hot line Meeting	Help Desk/Hot Line	1	0	Master Gardener	0	2010
Alvarez, Lynda	4/9/2015	Citrus Consult/Research	Help Desk/Hot Line	1	0	Master Gardener	0	2010
Alvarez, Lynda	6/11/2015	Research (Goji Article)	Public Education	2	0	Master Gardener	0	2010
Alvarez, Lynda	6/16/2015	Monthly Meeting	Master Gardener Program Meetings	2.5	0	Master Gardener	0	2010
Alvarez, Lynda	6/16/2015	On Line Scavenger Hunt #13 100%	Master Gardener Continuing Education	0	1	Master Gardener	0	2010
Alvarez, Lynda	6/16/2015	Scavenger Hunt #13	Master Gardener Continuing Education	0	1	Master Gardener	0	2010
Alvarez, Lynda	6/27/2015	Open Garden Day	Demonstration Garden	3	0	Master Gardener	60	2010
Benevides, Matt	1/22/2015	Master Gardener History& Local Program Overview	Master Gardener Continuing Education	0	4	First-Year Master Gardener	22	2015
Benevides, Matt	1/29/2015	Entomology and Insect ID	Master Gardener Continuing Education	0	4	First-Year Master Gardener	22	2015

10.0 Contact Reports

In this section you will learn how to:

- 10.1 Show/Remove Hours
- 10.2 Demographic Categories

10.1 Show/Remove Hours

View the demographics collected during volunteer activities for all time or a specific timeframe. Expand the report to show hours or projects associated with those demographics. Information derived from this report can be used to show parity within the outreach efforts of the UC Master Gardener Program and/or help work towards parity.

- Log into VMS
- Select **Contact Report** from toolbar at left
- To designate a specific time frame enter a **Start Date, End Date** and select **Submit**.

Administration
Manage VMS
Manage Roster
Retention Report
Add Calendar Event
Manage Projects
Newsletters/Documents
Category Reports
Hour Reports
Contact Reports
Photo Albums

Contact Reports

Show Hours | **Show Projects** | Show Removed Volunteers

Start Date: End Date:

Contacts	Wht	Blk	AmIn	Hsp	Asn	H&PI	Unk	M	F
Totals	7,223	137	91	281	123	4	845	4,052	4,652

10.2 Demographic Categories

The information for this report is compiled from the **Volunteer Hour** data entered by volunteers. The standards on race and ethnicity are modeled after the standard race and ethnicity classifications in Federal program administrative reporting and statistical data.

The choices are as follows:

- White-A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.
- Black-A person having origins in any of the black racial groups of Africa.
- American Indian.-A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliations or community recognition.
- Hispanic -A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race.
- Asian- A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- Hawaiian Pacific Islander-A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- Unknown-observer cannot identify
- Gender: Male or Female

11.0 Reappointment

11.1 Reappointment

11.2 Reappointment Communications

11.3 Collect Digital Recertification or Resignation Documents from Volunteers

11.4 Resigning or Inactive Volunteers

11.1 Reappointment

1. Annual reappointment is a requirement for all UCCE Master Gardeners to remain active in the program including:
 - Active
 - Limited Active
 - First-Year
 - Gold Badge
 - Platinum Badge
2. The minimum hours required to remain a certified UCCE Master Gardener are:
 - 25 hours - Volunteer
 - 12 hours - Continuing education

Note: First year UCCE Master Gardeners are required to complete a minimum of **50 volunteer hours** (no continuing education requirement) before the next certification cycle.

3. Reappointment consists of volunteers paying any fees associated with their UC Master Gardner Program (i.e. program fee, insurance fee) and electronically signing the following documents:
 - Annual Agreement
 - Code of conduct
 - Proof on Insurance

Note: All reappointments must be done digitally, only paper copies should be used as an accommodation under special circumstances.

4. All volunteer questions regarding the appointment process go through the Program Coordinator, Advisor or County Director.
5. The reappointment year runs on the state fiscal year July 1, 20## through June 30, 20##. Reappointment officially begins and is turned on in VMS by the statewide office on June 1.
 - Reappointment policy as outlined in the UC Master Gardener Handbook states: “In order to retain active status as a MG volunteer, MG volunteers must apply for reappointment within a specific sixty (60) day period as follows: Thirty (30) days before the end date of the current program year June 30, through thirty (30) days after the end date of the current program year, July 1.”
6. Coordinators are responsible for:
 - Assisting MGs in completing the reappointment process
 - “Send List to Director” for appointment
 - Verifying all MGs have been reappointed by the Director
 - Changing the status of MGs who do not wish to reappoint to “Inactive/Resigned”
 - Sending letters to all newly “Inactive/Resigned” MGs
 - Collect fees (if applicable)

[See the UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Section VI.
Reappointment (Second and Subsequent Years of UCCE MP Service)

11.2 Reappointment Communications

The statewide office will provide guidance to the coordinators through the reappointment process as well as post to the Statewide UC Master Gardener Statewide Blog and Coordinators Collaborative Tools to share the reappointment process.

Coordinators are responsible for communicating directly with their volunteers about reappointment. The statewide office has resources available to share with volunteers to assist in walking volunteers through the reappointment process on VMS.

11.3 Collect Digital Recertification or Resignation Documents from Volunteers

1. The statewide office will “turn on reappointment” for all counties on June 1. When logging into VMS volunteers will see the call to action box to the right. Coordinators can manage reappointment and check on the status of their volunteer’s reappointment process through VMS.



- Log into VMS
- Select **Manage VMS** from toolbar at left
- Select **Manage Reappointments**

2. By the second week of July every person on the roster should have a green “Renewing” or a black “Resigning” next to their name. If they don’t make contact with those volunteers who have yet to reappointed and ask if they plan on reappointing. If they do not plan to reappoint the coordinator will change their status to **Inactive/Resigned** in VMS and complete the Annual Agreement for them by selecting **Do Not Wish to be Reappointed** from the drop down menu. If they do continue to the next step.



Note: If you send the list to the County Director prior to having everyone completed, they must complete the following step multiple times.

Name	MG Type	Appointed	Terms Status	
Example Name One	Master Gardener	Yes	Renewed!	Reset Terms
Example Name Two	First-Year Master Gardener	Yes	Renewed!	Reset Terms
Example Name Three	Master Gardener	Yes	Renewed!	Reset Terms
Example Name Four	First-Year Master Gardener	Yes	Renewed!	Reset Terms

Reappointment/Release Reports

[Edit Program Year/Hours](#) | [Reset All](#) | [Send List to Director](#) | [Email Uncertified Members](#)

NOTE: All Master Gardener volunteer records should be kept during the subject program year. Once that year has ended, those records must be destroyed and replaced with the current year’s files. Records on Master Gardener volunteers who are no longer appointed must be retained for five (5) years and then destroyed. Full UCANR Policy available in [program handbook](#).

3. Select **Send List to Director** from top of Manage Reappointment page. Once you instruct VMS to send list for approval, provide county director with the following instructions:
- Log into ANR Portal, find **MG Reviews** on the right sidebar.
 - Click link- which takes you to a list of Master Gardeners and term statuses.
 - Select **View only 3 of 3** to avoid appointing someone who has not completed the terms.

- d. Select Master Gardener volunteer’s names for reappointment by clicking on check box on the left-hand side.
- e. Click submit reappointment information, via button at top of page.
- f. Coordinators must verify all Master Gardeners have been reappointed.
- g. Verify every volunteer has **Yes** under appointed header and bold green renewed or black resigned under term status. Note: If someone was missed, notify the County Director to log-in and appoint that person.
- h. Email the statewide office when the reappointment process is complete.

11.4 Resigning or Inactive Volunteers

Once Reappointment is complete the coordinator will provide written notice to all Inactive/Resigning Master Gardner’s informing them of their new status and the procedure to be reinstated. There is a template form letter for Inactive/Resigning Volunteers located with the reappointment resources available through the Coordinator Website.

For instructions on how change the status of a volunteer [see Section 5.5 Change Volunteer Status](#), to reinstate a volunteer [see Section 5.4 Reinstate a Volunteer](#). [See the UCCE Master Gardener Program Administrative Handbook](#) for Program Staff, Section VII. Inactive Status, Section VIII. Reinstatement

11.5 Roster Cleanup, Final Numbers and Insurance Invoicing

The UC MG Program will be charged an insurance fee based on the number of Active Master Gardeners in their roster. The term “Active Master Gardeners” include VMS classifications: “Master Gardener,” “First Year Master Gardener,” “Gold Badge,” and “Limited Active” as listed on roster as of July 1, 20##. This designation excludes “Trainees” and “Inactive/Resigned” members.

To ensure accurate billing program coordinators should implement “Roster Cleanup” after reappointment is completed. [See section 5.5 Change Volunteer Status](#). The statewide office will send invoices out to each county, confirm that the quantity being billed matches the number of “Active Volunteers” and confirm the account number to be recharged. If either the number of volunteers or the account number is wrong respond to the invoice with the correct information.

12.0 Photo Albums

In this section you will learn how to:

- 12.1 Create Photo Album
- 12.2 Edit a Photo Album

12.1 Create Photo Albums

Create photo albums and upload pictures to VMS for volunteers to view and preserve history.

- Log into VMS
- Select **Photo Albums** from toolbar at left

Photo Albums

[Create Photo Album](#)

Album	Pictures	
Pests of the Backyard	1	Edit

- To start a new Photo Album select **Create Photo Album**
 - Enter **Photo Album Name** and select **Create Album**
- To add picture to the photo album:
 - Enter a name for the picture in the **New File Name** field, this will be used as the caption
 - Select **Browse** and find your file
 - Select **Save File** to upload your picture.

12.2 Edit Photo Album

To edit a photo album or add a picture to an existing album

- Log into VMS
- Select **Photo Albums** from toolbar at left
- Select **Edit** next to the album to be edited or add a picture to
- The **Edit Photo Album** page will be displayed where you can **Update Album Name**, **Delete Album**, add file or delete files from the album

Album Created!

Edit Photo Album

[Return to Photo Albums](#)

Photo Album Name

Edit Photo Album

To add pictures to the photo album:

- Enter a name for the picture, this will be used as the **caption**
- Click 'browse' and find your file
- Click 'Save File' to upload your picture. It will automatically be re-sized if it is too large

You can use the arrows to change the order of the pictures in your album.

Pictures can be deleted individually below, or you can delete the entire album above.

New File Name

Find New File

Files Attached  [Snails Feeding on Mulberry Tree Leaf](#)

Photo Albums

[Create Photo Album](#)

Album	Pictures	
Pests of the Backyard	1	<input type="button" value="Edit"/>

Appendix 1 - Frequently Asked Questions

Q1: How does a program coordinator send an email to new trainees to alert them of their new VMS accounts and/or to create a new password in VMS?

A1: Once the trainee is added to the roster an automatic email will alert the trainee that they have an account and that they need to set-up a password. Content can be added to the “New Member Email” which will be sent out to new members only. Program coordinators can send a reset/set-up password link to new and active members by using the link below to gain access to the portal: <https://ucanr.edu/portal/login/UniversalForgotPass.cfm>

How to Logon to the Portal

To log into the portal for the first time:

1. Go to: <https://ucanr.edu/portal>
2. Click on the 'New user? Forgot your password? Click here' button.
3. Enter your e-mail address and click the button.
4. If your e-mail address is in our system, an e-mail will be sent which contains a link to access the portal.
5. Click on this link to enter the system.

The link will only work one time. If you forget your password again, you will need to re-submit the access request.

Once you are in the system, you can change your password.

If you are NOT in the system, please contact your office manager or MSO.

Q2: Is there information to give to new MG trainees on what to do when they receive the “Accessing Master Gardener System” email?

A: Volunteers receive an email generated from VMS no-reply@ucdavis.edu which provides a link to their portal account. This email is sent when the coordinator hovers their mouse over the intended recipients email address on the "Manage Roster" page - it will send them login procedure info. The coordinator should go into "Manage VMS" and then "Manage email message" first, however, to edit the information. [See section 2.1 Accessing VMS for the first time](#)

Q3: Is there any training for new users to VMS?

A: There is a VMS help website – with very basic intro materials, here: <http://ucanr.edu/sites/vmshelp/> this is meant for volunteers who are new at logging into VMS, etc. Unfortunately there is no advanced training for VMS admins at this time. The statewide office will be developing more VMS help and admin resources in the future (like this document).

Q4: How can I reset a volunteer’s password in VMS?

A: [See section 5.6. Reset a Volunteer’s Password](#)

Q5: How can I/coordinator give a new supervisor access to my county VMS?

A: The coordinator can add the new supervisor to the VMS roster and designate them in their profile as “UC Staff.” If the supervisor will need access for recertification review this has to be done at the statewide level by adding the person to the recertification reviewers/program admin.

Any member with UC Staff listed cannot be edited from the statewide office. Submit a ticket with IT (through the ANR Portal) for IT to make changes. UC Staff is controlled by their employee accounts, if they want to update they can do so in their portal.



Q6: Coordinator has a new training class that ends on Feb 20. They want them to sign all the appropriate forms electronically at this time. Can VMS be set up to “Manage Reappointments” so the “Sign Your Forms” flag goes only to the new class and not whole membership?

A: Yes. Change the status of the volunteers in VMS from Trainee to First-Year Master Gardener ([see Section 5.5 Change Volunteer Status](#)). [Contact the statewide office](#) to have VMS Reappointment turned on for your new graduating training class.

Q7: What forms are required to give trainees to sign?

A: Assuming the trainees are past the application period and are ready to begin classes, many counties print out the Code of Conduct form ([available on the UC ANR Program Administrative page](#)) and ask trainees to sign so that they know the behavior that is expected of them while completing training and as a volunteer.

Some counties also choose to have trainees sign the photo release (available http://anrcs.ucanr.edu/Digital_Media_Services/?faq=228&col=12), as they want to document the training with photographs. Other paperwork such as the volunteer agreements, and driving document would be electronically signed at reappointment when they graduate and become First-Year Master Gardeners.

Q8: Does a volunteer have to have an email address to access VMS?

A: Yes

Q9: When a volunteers transfers from one county UC MG Program to another and they are added to the roster their hours previously logged do not come over with them on VMS. Do I need to manually add those hours and activities?

A: Volunteer and continuing education hours don't transfer with a volunteer from one county to another – for federal reporting purposes hours are 'owned' by the county in which they were given. To get a MG transfer volunteer up-to-date in a new county enter their current fiscal year (FY) volunteer and continuing education hours, their past FY's volunteer and continuing education hours (as one big lump sum), and then their total for all time of volunteer and continuing education hours as an entry in the comments section (99 character limit) of their volunteer profile (not assigned to a generic “transfer” project). The volunteer should be responsible for tracking when they hit their program milestones.

Q10: How can MGs store photos that allows other MGs to be privately and securely stored and have access those photos for appropriate use?

A: UC has an internal system for storing images, called the [ANR Repository](#) that only staff can upload images into (ie: program coordinator / advisor) but volunteers can download from. VMS has the capacity to upload images but it compresses them to a very low-res setting, I would not recommend using this to store images, images can be uploaded to the CT group “documents” section for images. [see Section 12.0 Photo Album](#) for more information

To accommodate and include volunteers many counties have set-up a generic account with a general email and login for members using a free online account like you (Flickr/Dropbox). If having staff upload images into the repository is not possible an MG could create a general email (e.g. one from Google, YAHOO, or other such as mgmc@gmail.com) with a universal login and share it with their MG group so photos can be uploaded and accesses by the group as a whole.

Q11: When a MG resigns and their status is changed to inactive/resigned can they be deleted from the roster?

A: Yes, although a resigned MG has thirteen months to seek reinstatement they can be deleted from the roster without their volunteer or continuing education hours being lost. To reinstate an MG [see section 5.4 Reinstate a Member](#).

Appendix 2 - Reappointment Quick Tips and Frequently Asked Questions

Q1: What if my volunteer doesn't have internet access/ wants a paper copy/ will be on vacation?

A: If a volunteer cannot recertify online the coordinator can submit recertification papers on their behalf. When a coordinator digitally submits papers for a volunteer, the county must retain hard copies signed by the volunteer on file. Submitting digital files for a volunteer should happen on a case-by-case basis, and only as a special accommodation. The coordinator is not signing for them - but rather telling VMS there is a hard copy version on file for these agreements. Click "Submit Papers" button on the left of volunteer's name. This takes you to a page that asks the specifics about the type of agreement you are submitting on their behalf and whether they agree to the Code of Conduct and Driving Agreement.

Q2: What if my volunteer does not recertify?

A: If a volunteer cannot be contacted or upon contact says they no longer wish to continue in the program their status must be changed to "Resigning" to not be billed an insurance fee. To select a volunteer as resigned - select "Submit Papers" and "Wish not to be reappointed". Note: Although the above action signifies a volunteer as resigning on the reappointment roster, you must also go to their profile (from the Manage Roster tab) and change status from "Master Gardener" to "Inactive/Resigned" in order to remove their access to VMS, and ensure they are not counted on your roster for insurance billing. [See section 11.4 Resigning or Inactive Volunteers](#) and [Section 5.5 Change Volunteer Status](#) for more information.

Q3: Can I delete a volunteer From VMS?

A: Yes! A volunteer can be deleted from a program's roster without losing any of the data associated with the profile. In the past it was communicated to not delete volunteers in fear of losing data, this issue has been addressed by IT and is no longer an issue.

Q4: What if my County Director can't find the MG Reviews link?

A: If there has been a change in leadership in the past year, the new County Director may need to be added as a review-level administrator. Please [contact the statewide office](#) to have your County Director added as a review-level admin.

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