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Volunteer Management System (VMS)

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 and 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.

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

### 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.).
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.

   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.

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.

   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:

1. **4.1 Manage Access to VMS**  
2. **4.2 Manage Administrators**  
3. **4.3 Manage Home Page News**  
4. **4.4 Manage New Member E-mail**  
5. **4.5 Manage User Options**  
6. **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**.

#### 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.**
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.
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.

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.

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**
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

**Subject**

**Message**

![Text editor window]

**Words:** 0

**Attachment** (optional)

**Copy Me**

Send me a copy of the email

[Send Email]
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.

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
• To send the reactivated member an email with access instructions to VMS
  o 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.

### 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

---

**Manage Member Roster**

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anger, T.</td>
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</tr>
<tr>
<td>Eten, Lea</td>
<td>Gold Badge</td>
</tr>
<tr>
<td>Gable, M.</td>
<td>Master Gardener</td>
</tr>
<tr>
<td>Krause, D.</td>
<td>UC Staff</td>
</tr>
<tr>
<td>Snowden, L.</td>
<td>Trainee</td>
</tr>
<tr>
<td>Wormald, M.</td>
<td>Inactive/Resigned</td>
</tr>
<tr>
<td>Wormald, M.</td>
<td>Trainee</td>
</tr>
</tbody>
</table>

---

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

**View Reappointment Terms and Conditions**

<table>
<thead>
<tr>
<th>Name</th>
<th>Lauren Snowden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Editing</td>
<td>UC ANR staff details cannot be edited here</td>
</tr>
<tr>
<td>Volunteer Status</td>
<td>Inactive/Resigned</td>
</tr>
</tbody>
</table>

---

**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**

<table>
<thead>
<tr>
<th>Change Password</th>
<th>Enter Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passwords must be at least 7 characters in length with no spaces and contain a number or special character.</td>
<td></td>
</tr>
</tbody>
</table>

### 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**

![Calendar Event](image)

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
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**
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
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.

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.

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

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.
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.

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.

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:
   a. Log into ANR Portal, find MG Reviews on the right sidebar.
   b. Click link- which takes you to a list of Master Gardeners and term statuses.
   c. 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 Gardener’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
• To start a new Photo Album select **Create Photo Album**
  o Enter **Photo Album Name** and select **Create Album**

• To add picture to the photo album:
  o Enter a name for the picture in the **New File Name** field, this will be used as the caption
  o Select **Browse** and find your file
  o 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

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**Edit Photo Album**

**Return to Photo Albums**

**Photo Album Name**

**Update Album Name** | **Delete Album**

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**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
- Select ‘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**

**Browse** | **Save File**

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**Photo Albums**

**Create Photo Album**

**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

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 Reinstall 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.