

Master Gardener Plant & Insect Clinic Procedures

Come Prepared for Your Scheduled Clinic:

- Be on time – shifts start at 9:00 a.m. and 12:00 p.m. You should be prepared to answer questions when the Clinic opens to the public.
- Wear your Name Badge.
- Wear clean, neat, and appropriate clothing and attend to personal hygiene. Out of respect for others who may have allergies, please refrain from wearing fragrances.

At Start of Clinic Shift:

- Enter your name and date on the Clinic Staffing Sheet in the front of Plant Clinic Log Book.
- Review phone and Log Book procedures.
- Review the Log Book, then check for any new specimens that have come into the Extension office.
- New questions are in the top tray of the desk tray organizer and “in process” items are in the middle tray.

Phone Etiquette and Use:

- When phone rings, identify yourself: *“This is (first name). How may I help you?”*
- Listen carefully to the problem; ask questions for clarification and to get the big picture. Be sure you clearly understand what the client wants or is really asking. Don’t be afraid to ask, “What do you want to know?” if it is not clear to you.
- Use the “HOLD” button if you need to retrieve a reference or consult with your partner.
- Try to keep conversations to the point. Some people love to talk and tie up the phone while others are trying to get through or waiting for you in the Clinic.

- If a caller gets too “chatty” or has a multitude of questions, encourage them to come into the clinic and bring a sample of their problem for further information.
- Before hanging up, politely request the client’s name, address, phone and e-mail if available. If they question why, explain that we need to document our contacts for the county to help justify funding for this service and if we need to send out materials to help them with their problem, we need a mailing address. In some cases, when information is on line, we can e-mail the information to them or let them know where to find it on line.
- **Very Important for Out-Going Calls:**
 - Local Calls Dial “9” + Number
 - Long Distance Dial “9”-1-Area Code + Number, wait for second dial Tone, then dial 3 671 379
- See complete instructions posted in the Policies and Procedures manual.

Problem Diagnosis Procedure:

- Review any new questions collected since the last clinic and any “incomplete” questions marked in **GREEN** on the Log sheets.
- New questions are in the top tray of the desk tray organizer. Incomplete questions are in the middle tray, and items to be filed in the Log Book are in the bottom tray.
- Remember, gathering as much information as possible is the primary objective.
- Use the correct identification or problem diagnosis form to collect the information. Forms are in the desktop organizer.
 1. **Plant Problem Diagnosis: Home and Ornamental Landscape.** Use this one for most plant problems and for insects found on plants.

2. **Lawn & Turfgrass Problem Diagnosis.** Use for all turf grass/lawn problems.
3. **Insect Diagnosis Request.** Use for insect identification ONLY and when NOT connected with a plant problem.
4. **Plant Identification.** Use for ornamental or landscape plant identification. Not to be used for weed identification.
5. **Weed Identification Form.** For weeds only, not for landscape plants.

- If the problem is a simple question about a common problem that you can answer with a quick reference and a straightforward recommendation, inform the client and complete the entry in the Log Book. (See following instructions.)
- If the problem/question is more complex or needs more research, use the appropriate diagnostic form to gather all the necessary information. Also use the diagnostic forms for problems requiring a sample in order to come up with an accurate diagnosis.
- When the questions can't be answered on the spot, tell the client s/he will be contacted when a diagnosis and recommendation have been made. Tell them it might be 5-10 days before they receive a response, especially if it needs to go to Puyallup. Make sure you have the name and mailing address for follow-up contact.

End of shift:

- Check Log Book and Diagnosis/ID forms for completeness of entries. Did you initial, date, get name and phone number, and color-code each entry correctly?
- If an item is not completed, put the Diagnosis/ID form in the "Incomplete" tray of the desk tray organizer and the labeled sample on the desk. If the sample must be refrigerated, make sure it is labeled and put in the refrigerator in the kitchen across the hall.

- On the Clinic Staffing Sheet in front of the Log Book enter total number of clients helped, including Affirmative Action information on women and ethnic/racial groups.
- Put references away and straighten up Clinic room.
- Return any reference books to the appropriate space on the book shelves.

WSU Publications / Photocopies:

- For clients who wish to purchase WSU bulletins, pull the copy from the file cabinet and direct them to the front desk.
- The person staffing the front desk will calculate the costs and handle the money. (If no one is available at the desk, ask Debbie or Sheila to help the client.)
- **If the publication or photocopies are being mailed to the client, complete an invoice, including sales tax, but not the postage or subtotal, and address the envelope. DO NOT SEAL THE ENVELOPE! Staff will calculate postage, subtotal the invoice and mail the material. There is a minimum charge of \$1.00 for anything mailed out.**
- Photocopies may be made of non-extension material for 10¢ per copy (no tax). Take item to the Extension office for copying. Return original(s) to file.
- Do not allow clients to take reference materials from Clinic room. Unfortunately, we may never see it again.
- Free catalogs of current educational materials from WSU Bulletin Office are available in Clinic room and Extension office.

Plant & Insect Clinic

Log Book Procedures

IMPORTANT VITAL STATISTICS:

- Fill in all requested information on the Log Sheet form. **It is critical to get the client's name, address and phone number and e-mail if available.** There are times when follow-up contact by phone or mail may be necessary.
- **Write or print clearly** so it can be read by someone else. Don't let the next person guess what you were trying to think or say.
- **Enter the date** the problem or question was received. Be sure the date is also on the Diagnosis/ID form.
- **Affirmative Action Reporting:** Check if the client is Male or Female using verbal or visual clues. Also make a note if client is obviously a member of a racial or ethnic minority. You don't need to ask any questions about their gender or status.

1. PROBLEM / QUESTION

- Describe the problem as completely yet briefly as possible. INITIAL your entry at bottom of section.
- Remember to use the appropriate problem diagnosis or identification form if necessary and especially with a sample.
- Put a label on any sample that comes in with date, name, and phone number.
- Check the appropriate box(es) at the bottom of the Problem/Question column for a quick glance at the type of question asked.
- Add your initials at the bottom of the Problem / Question section.

2. ACTION TAKEN:

- After diagnosing the problem, record the diagnosis and recommendation(s) for action.
- Indicate which references you used in making the diagnosis and recommendations.

- If the question has to be referred to another person, indicate who and color code per the following:
 - ◆ **GREEN** – to another MG (indicate name) or to Debbie
 - ◆ **ORANGE** – to WSU Puyallup Plant Clinic
- **When you do a referral:**
 - ◆ Fill out the appropriate Diagnosis or ID Form. If a sample is available, **attach a label** with date, client's name, and phone number.
 - ◆ If to Debbie or another Master Gardener with expertise in a particular area, **make sure you contact that volunteer about the question. Ask them to follow up with the client and complete the Log Book entry.**
 - ◆ Indicate on the Log Sheet with a **GREEN** highlighter if there is a sample to go with the entry.
- Debbie is the next line of referral after other Master Gardeners. If she can't determine the problem, she will recommend when to send samples to the Puyallup Plant Clinic.
- Put your initials in lower right corner.

3. FOLLOW UP:

- If unable to reach a client during clinic hours or a sample needs to be brought in, **color FOLLOW UP section GREEN** and note that a sample has been requested. This indicates the problem is incomplete and the next clinic needs to follow up.
- Enter date(s) and your initials when follow up calls are made, even if you were unable to reach the client.
- When the client has not been reached in 2-3 tries, use a **postcard** to let them know we haven't forgotten them or their question, and put it next to the postage meter.

- Note and initial when the postcard was mailed on the Log Sheet.

4. **DONE:**

- When the question has been satisfactorily resolved, enter the date and your initials in the bottom lower right corner of the log entry.
- Color code the **DONE** section as follows:
 - ◆ **PINK** if handled by MG on duty or by a referral to someone with specific expertise.
 - ◆ **ORANGE** if completed by Sheila or sent to the Puyallup Plant Clinic.

- When a response sheet comes back from the Puyallup Clinic, it will be placed in the bottom tray of the desk tray organizer. 3-hole punch it and insert it behind the original entry in the Log Book.
- File completed entries in the Log Book by month and date received.
- Thank you!