

# Master Gardener Office Procedures

## Multnomah County

### Preparation

- Allow enough time to get to the office 15 minutes before scheduled time.
- Wear your Master Gardener badge.
- Please don't wear cologne or perfume during your phone shift.  
Notify Sally Campbell, Phone Chair, ([sally.mult.phones@gmail.com](mailto:sally.mult.phones@gmail.com), 503-810-8717), in advance if you will be working with a service dog.
- Cell Phones: Please turn off your cell phone or set on vibrate: if necessary take calls in the hall.
- Optional: Bring your notes from training.
- Optional: Bring coffee/water or your lunch. However, please eat and drink away from the computer keyboard.
- Optional: Bring laptop computer as the office has WiFi.

### Sign-up for phone shifts and Shift times

- Sign up for shifts at CERVIS Event Registration: [www.metromastergardeners.org](http://www.metromastergardeners.org) (See "CERVIS: How to register for events")
- If you have questions about signing up for phone shifts on CERVIS, please contact Sally Campbell, Phone Chair: [sally.mult.phones@gmail.com](mailto:sally.mult.phones@gmail.com), 503-810-8717
- Multnomah phone clinic shifts are 10AM-noon and/or noon-2 PM, Monday through Friday, except office holidays.

### Emergency Procedures

- It is your responsibility to familiarize yourself with the Montgomery Park building emergency procedures.
  - Pages from the Montgomery Park Tenant Handbook are posted on the bulletin board and in the front pocket of the Office Information Binder.
  - Locate emergency exits.
  - The complete handbook is available at the link below and Michele Levis has a hard copy available at her desk.  
<http://www.montgomeryparkbuilding.info/toc.cfm>

### Cancellation and Substitute Policy

- If you can't make your shift, **you are responsible for finding your replacement.**
- Unregister yourself for that shift on CERVIS. Then have your substitute register on CERVIS in the shift you just unregistered for.
- **Note: the unregister option for the Multnomah Phones is closed on CERVIS 2 days before your shift.** In such instances, you must locate a substitute for your shift, and then notify Sally Campbell, Phone Chair: [sally.mult.phones@gmail.com](mailto:sally.mult.phones@gmail.com), 503-810-8717
- A substitute list is available from Sally Campbell.
  - Begin by e-mailing or calling other Master Gardeners who are listed on the substitute list. Note: Interns sub for Interns; Vets for Vets.
  - Notify Sally Campbell of the substitute's name and the shift being filled.
  - Also call the Multnomah Co. Phone Clinic 503-445-4608 and leave a voice mail message or a message with the MG who answers the phone with your name and the name of your substitute and the date of the substitution.

- Ask the MGs on duty to note the change on the schedule in the office.
- If you are unexpectedly delayed, call the Multnomah Co. Phone Clinic 503-445-4608 and leave a voicemail message or notify the MG who answers.
- If you have a last minute emergency which prevents you from coming to the office, notify Sally Campbell and call the Multnomah Co. Phone Clinic and leave a message or notify the MG who answers.

## General guide

- You will receive a confirmation email when you register on CERVIS. Make sure to match the shift time/date saved in your calendar with the confirmation e-mail.
- Please don't go to the office if you have **any** stage of a contagious disease (i.e.: cold, influenza, gastroenteritis, etc.). Be considerate and get a substitute.
- If an MG on your shift is more than 20 minutes late, call to diplomatically remind the individual s/he was expected for the shift. Phone numbers are with the monthly schedule on the bulletin board.
- If your MG shift partner can't be reached by phone or is a "no show," notify Sally Campbell and write "no show" on the monthly calendar.

## Parking

- **Cars** can be park in the west lot of the Montgomery Park building, however you are limited to 2 hours in these 'Visitor' spots. **The lot is regularly patrolled.**
- If you will be parked more than 2 hours, you need to find a spot with no time restrictions on one of the neighborhood streets. If you have limited mobility, it is possible to get an all-day parking pass from Michele Levis, Operations Administrator for the West Multnomah SWCD (she is at the front desk when entering the doors of WMSWCD).
- Parking for **bicycles** is available inside the loading dock entrance, which is located on the north side of the Montgomery Park building.

## Office Staff

- Michele Levis is the Operations Administrator for the West Multnomah SWCD. Michele is our primary contact for any logistical questions regarding the office (office questions only, not Master Gardener OSU Extension questions).
- Dick Springer is the District Manager for the West Multnomah SWCD.
- The complete WMSWCD staff list is posted on the bulletin board.
- **Remember we are guests in the office, so please limit your questions, requests and any disruptions so as not to burden Michele or other WMSWCD staff.**

## First duties

- The **first** MG to arrive enters through Suite 450 of the West Multnomah County Soil and Water Conservation District (West Multnomah SWCD) Office and unlocks the doors to the Master Gardener office Suite 453. Additional MGs should enter at Suite 453 to reduce traffic through the West Multnomah SWCD office.
- Turn on the computer. Turn on the lights. (Switch left of book case)
- Begin a new Daily Log. (See Tab B: Daily Log)  
(Blank sheets are in the clear plastic rack on the desk.)

- Check voice mail messages. (Basic directions in plastic stand on desk, detailed instructions in front pocket of Office Information Binder)
- Check MG e-mail, instructions next to computer. (also see Tab J)
- Check the bulletin board for new announcements.
- Review recent Daily Logs in the Daily Log Binder. Questions are often seasonal.
- Make reminder calls to MGs scheduled for duty for same time period next week. (Phone numbers are with the monthly schedule on the bulletin board.)
- Record each reminder call on the Daily Log. (See Tab B: Daily Log)
- Check the Referral Box to see if any Referrals need attention.
 

*Note:* An unsolved Referral may be present if the inquiry arrived too late during the previous shift to be resolved.  
(See Tab E for full details about Referrals)

### **Poll clients**

- Ask clients where they heard about the Multnomah County Phone Clinic. Log in daily log **and** tally on sheet located on desk.

### **Walk-in clients**

- Walk-in clients have first priority.
- If you are busy with walk-in clients, let the voice mail pick up calls.
- While speaking with the client,
  - Ask the client's name and phone number/email and/or street address. (Some people may refuse.)
  - If applicable, refer to *Questions to Ask Clients*. (green laminated sheet)
  - Jot down notes on a tablet or scratch paper.
- After the contact, record it on the Daily Log. (See Record Keeping, below.)
- If your shift is unable to answer the client's question, see that topic on page 4.

### **Answering phone calls**

- Say **“OSU Extension Master Gardener volunteer. How may I help you?”**
- While speaking with the client,
  - Ask the client's name and phone number/email and/or street address. (Some people may refuse.)
  - If needed, refer to *Questions to Ask Clients*. (green laminated sheet)
  - Repeat the question out loud so the other MGs can start researching.
  - Jot down notes on a tablet or scratch paper.
- Don't offer your name.
  - If the client asks, give only your first name.
  - If needed, explain that you are just one of many Master Gardeners; it's unlikely you will be in the office the next time the client calls.
- After you complete the call, record it on the Daily Log. (See below.)
- Don't contact clients after you leave the office. Instead, call the office (503-445-4608) to ask the MGs to contact the client.

### **Record keeping on the Daily Log** (Also see Tab B: Daily Log.)

- Record client's contact info – name and phone number, address or email.

- Record a brief summary of the question and answer, with your resources; when possible, include page numbers.
- Record if the question was received as an email, phone call, or from a drop-in client.
- Record which email folder the client's email and MG response were filed in, e.g., Insect, Plant ID.
- One client is one entry, even if s/he had multiple questions during that contact.
- **Do not** count your reminder calls to next week's MGs as contacts in the totals.

## To request & examine a sample (See Tab D: Samples)

### To return phone calls

- Press one of the MG buttons on the phone (MG1 or MG2) for an outside line, and then dial the phone number.
- Long distance phone calls may be returned to clients. Press one of the MG buttons (MG1 or MG2), followed by the number 1, plus the area code and number.
- Call back before the end of your shift, even if it is only to tell the client other MGs will continue the research and will contact him/her later.

### How clients may obtain OSU publications

- You may direct clients with Internet access to the OSU Publications website <http://extension.oregonstate.edu/catalog/>.
  - Some publications aren't online.
  - See tab Q, 'Publication and Videos' in the MG Resource Binder, for a current list of OSU gardening publications.
- Or, you can email some publications as attachments or provide a link.
- For clients without Internet access you can print out those publications that are available online and mail the publication to the client. Give walk-in clients printouts of the publications.
  - Address envelope to be mailed to client, affix return address label. Give envelope to Michele to be mailed. Record in log book that information was mailed to client.
  - At this point there is **no charge** for publications that we print out and send to the client from the Multnomah County office even if a charge is noted on the publication. There is also no charge for the postage. (Note: There is a charge for some publications and postage in Wash. & Clack. Co. Refer to specific office procedures document.) Document what was sent in the Daily Log so expenses can be tracked.
- For publications not available online call the Wash. Co. phone clinic and ask the MGs to mail the publication to the client. Inquire with MGs about possible charges for the publication (as they do charge for publications over \$5.00) and postage and notify the client and verify if they would still like the publication sent. Clients then mail the fee to the Wash. Co. office per the 'honor system'.
- There are some publications in the file drawer. These are originals and **should not be given to clients**. If it is a publication that is not available on-line, make a copy for the client.

## To make photocopies

- The copy machine is in the West Multnomah SWCD office, in the room just east of our office space. Only make a limited number of copies. For large quantities contact Jordis. No code is needed for the copier.
- Always write the source on the photocopy.
- **Make copies for Phone Clinic or client use only. Please don't make personal copies.**

## If your shift is unable to answer a client's question/problem

- Tell client the question requires further research; a different Master Gardener will call back later.
- Suggest the client call the MG office again if no one calls back within a week.
- Fill out the appropriate Referral form completely **and** upload the information to the MG Referral Forum (See Tab E: Referral Forms) Blank forms are in the standing rack at MG Desk 1.
  - Blue = Plant for ID
  - Green = Plant Problem
  - Yellow = Insect, Spider, Etc.
- Record contact in Daily Log. (See Tab B) (e.g.: "Uploaded Referral for client.")  
(e.g.: "Completed Referral of (date) for client.")

## Unresolved Referral forms

**Note:** See Tab E for information on the new referral procedure and use of the MG Dx (Diagnostician) Forum.

- Place Referral form that has been uploaded to the MG Referral Forum in the brown folder in the Referral basket.
- Once the identification/diagnosis is completed on the MG Referral Forum, follow the directions in Tab E: Referrals, in the document *When & How to Use Referrals*. **Please remember -**
  - Refer commercial inquiries to an appropriate extension agent. These include government and industrial entities (e.g. nursery/garden centers, growers, spray services, landscapers, pest control operators, ODOT, parks departments).
  - When clients make inquiries for personal health, including an unshakable belief that live organisms are present in or on the skin, suggest s/he seek advice from his/her health care professional. If they persist, refer to Weston Miller, Urban Horticulturist, 503-706-9193
  - Refer to Weston any situation that could involve possible litigation.(See Tab F Responses to Clients.)

## References & supplies

### Each MG desk

- There are copies of the PNW Management Handbooks, Sunset Garden Book, MG Resource and References Book (white binder with tan spine), Office Information Binder, The Sustainable Gardening Handbook, The Daily Log Binder, Metro Master Gardener Directory, Natters Notes and others.
- Each desk has pencils, pens, scratch paper, envelopes, and return address labels (Michele has additional return address labels).

## Book shelf

- Reference books are organized by topic.
- When replacing a book on the shelf, match the colored label on its spine to the topic label.
- Many resource books use only Latin names in their indexes. If you know only the common name, use Sunset's index to determine the botanical name.
- *Helpful Books and Websites* (See Tab L) is an annotated list of books in the MG library as well as some of the more useful websites in the computer Favorites list.
- Books are for IN-OFFICE USE ONLY.

## File cabinet

- The file cabinet contains 2 drawers of some OSU publications and other background information that may be useful.
- For a complete list of file sections see *first* hanging file in top drawer labeled, "File System List".
- Remove desired brown folder with contents. Leave green hanging file in drawer.
- These are originals or single copies. **Do not give these to clients. Make a copy if necessary.** Note source on copy.
- After use, replace brown folder and contents in correct corresponding green hanging file.
- If you have suggestions for handouts/brochures to be considered for inclusion in the files, please place them in the labeled magazine rack on top of the file cabinet. **Please do not place into the file cabinet.**

## Computer (Also see Tab J: Computer.)

- You may search the Internet to aid in diagnosis, but **always use the PNW Management Handbooks for management recommendations.**
- Look for websites with information relevant to the Northwest.  
**Warning:** Some insects, plants, and other problems aren't in the Northwest.
- Limit your search to relevant, credible, research-based information (See Tab J and Tab I for more details).
- You may direct clients to the OSU Extension publications website to download those publications available online. (<http://extension.oregonstate.edu/eesc/>)

## Microscope (Also see Tab H.)

- Instructions on microscope use are also on the table with the microscope.
- A 10x loupe, a dissection kit, baggies, and containers for specimens are located in the cabinet above the microscope.

## Camera (Also see Tab E: Referral Forms, How to Use MG Camera)

- Camera is located in a plastic box, on the table behind the Microscope.

## West Multnomah Soil & Water Conservation District

- The tall metal bookcases and the metal map cabinet (under the insect collection cabinet) belong to West Multnomah SWCD. The bookcases are part of their library. We are welcome to look at the material in the bookcases when we are in the office. Please be respectful and handle with care and return the items to where you found them. Do not give any items from these locations to clients.

- You are welcome to take and distribute any of the brochures located in the brochure racks near the front door of the West Multnomah SWCD.
- Remember we are guests in the West Multnomah SWCD office. Please respect their space and refrain from unnecessarily going into their office areas.

### Office Supplies

- Back-up office supplies (paper, pens, post-it notes, envelopes etc.) are located in the 2 top drawers of the 4-drawer filing cabinet located in the office area **behind** the east wall of our office. The 3rd drawer down is used by WMSWCD staff.
- Paper towels, cleaning spray, alcohol wipes, and protective gloves are in the cabinet above the microscope.

### Extra time

- Familiarize yourself with the resources on the desk and book shelf.
- Review resources in file cabinet.
- Familiarize yourself with the computer. (See Tab J.)
- Visit some of the websites in the computer Favorites list.
- Practice plant and/or insect problem diagnosis with the other MGs.
- Familiarize yourself with the microscope. (See Tab H.)

### End of shift

- Review Daily Log for completeness; make necessary additions.
- **Count the contacts** on the Daily Log and record the total at top left of that sheet.
- **Don't count** the reminder calls to next week's MG shift in the totals.
- File Daily Log sheet(s) in the Daily Log binder in the tab "Completed Daily Logs".
- Place Referral forms uploaded to the MG Dx Forum in the brown folder. If you did not have time to upload a referral place it in the Referral box (on top).

**Note:** See Tab E for complete information about the referral procedure and use of the online MG Dx (Diagnostician) Forum

- Put everything away and straighten the books, desk and file cabinet.
- If needed, clean office surfaces (cleaning supplies in cabinet above microscope).

### End of day

- Turn off the computer and lights (the light switch is left of the bookcase – one light will remain on).
- Close Blinds.
- **LOCK DOOR** to Suite 453. All but one MG exit through Suite 453 doors. The remaining MG should **lock** Suite 453 doors and exit through Suite 450 doors.