

# When & How to Use Referrals

Master Gardeners provide management suggestions only when the diagnosis or identification has been finalized.

Tentative diagnoses or identifications must be verified before recommendations are offered.

## **Revised procedure** as of January 2011

If you receive a question your shift cannot complete, fill out the appropriate paper Referral form and upload the information, plus images, to the MG Referral Forum.

## **When to write a Referral Form for phone calls and/or walk-ins**

- **If** your shift cannot answer a client's question that doesn't require a sample
- **If** your shift cannot answer a client's question that has the required sample
- **If** you would like to have your shift's diagnosis or identification verified
- **If** the call/walk-in arrived too late for your shift to complete the diagnosis:
  - (1) Complete the paper Referral form and
  - (2) Attach a sticky note requesting the next shift to upload the information to the MG Referral Forum.

## **When not to write a Referral**

- **If** the client will bring a sample later  
(**Instead**, document the case on the Daily Log)
- **If** the client will send/bring a photo later.  
(**Instead**, document the case on the Daily Log)
- **If** the client intends to come in for a publication.  
(**Instead**, someone else will pull the publication when the client arrives)
- **If** you completed the diagnosis and referred the client elsewhere
- Tell the client his/her question requires further research; a different Master Gardener will call back later

## **Before you write a Referral**

- Tell the client his/her question requires further research; a different Master Gardener will call back later
- Suggest the client contact the MG office again if not contacted within 3 days

## **How to write a Referral**

**Step 1:** Fill out the appropriate paper Referral form

- Green = Plant Problem
- Yellow = Insect, Spider, Etc.
- Blue = Plant for ID only

**Step 2:** Take digital images of the client's sample (See below)

**Step 3:** Upload the information, plus the necessary images, to the MG Referral Forum

**Step 4:** Record the contact in the Daily Log

e.g.: Uploaded Referral for (client's name & contact info) concerning (inquiry).

**Step 5:** Place the paper Referral form in the designated brown folder on the MG desk

**Step 6:** Secure the sample in an appropriate container, label it with date and client's name

(continued)

### **Take digital photos of all client samples**

- Include overall, mid-range, and close-up views  
Show the transition zone between affected & healthy sections  
(See *How to Use the Office Camera*, later in this section)
- Transfer images to MG FORUM IMAGES folder (Computer desktop, lower right)  
(See *How to Transfer Images to the Computer*, later in this section)
- Label images with date & client information

### **Upload the Referral to the MG Referral Forum**

- Upload the Referral and pertinent images to “Incoming Referrals” in the MG Referral Forum  
(See *How to Upload a Referral to the MG Forum*, later in this section)
- After the Referral is uploaded, place the paper Referral form in the designated brown folder on the MG desk
- Record the contact on the Daily Log  
e.g.: Uploaded Referral concerning (the inquiry) for (client’s name).

### **Feedback from MG Diagnosticians (MG-Dx)**

- After the Referral is uploaded to the MG Forum, MG-Dx will do their best to complete the diagnosis within 2 working days
- After the MG-Dx resolve the Referral, the MG-Dx will notify the following of the diagnosis and any recommendations needed
  - a. The client
  - b. The interested originating MGs, if any
  - c. The MG office, so that the MGs on duty can do the following:
    - (1) Record the diagnosis and recommendation on the Referral form,
    - (2) Sign the form
    - (3) Record the date of completion
    - (4) Place the completed Referral form in the Referral Archives binder
    - (5) Record the action in the Daily Log