Office Protocol

Arrival Time: 12:30
Check in with the Veteran who will be training you.
He/She will show you where the office key is kept and introduce you to the office staff: Laurie Miller and Mary Hoffmann.

The following is a step by step guide of the various duties which you will perform whenever you work in the clinic.

BETWEEN 12:30 and 1:00

1. Get the key from front office and greet the staff.
2. Unlock the clinic door and turn on the lights.
3. Return the key to the front office. (It is used by everyone)
4. Check for messages on the board and specimens or other items on the file cabinet.

   Go back to the clinic office and

   1. Turn on the computer and enter the password; it is located in the red folder on the shelf above the computer. Check for Emails. Learn with your vet how to use the phone. This includes both local and long distance. Make sure the mic button is on and the DND button is off. Check for and retrieve phone messages (procedures for doing so are posted on the bulletin board.
   2. Review the log book for any FOLLOW UP calls and return them now.
   3. The vet will show you where to find and how to fill out the FOLLOW UP sheet. Make sure to document any attempt to call—even if you don't actually speak to the client, we must document 3 attempts. Please sign your name and enter the date each time.

BETWEEN 1:00 AND 4:00
ANSWERING CALLS

How to answer incoming client calls.

1. Answer the page and acknowledge with a thank you.
2. Push the appropriate line and pick up the receiver. Your greeting is "OSU Extension, Master Gardener Plant Clinic, this is________speaking." How may I help you?
3. Ask the client for their name and phone number. Explain that we use this information for our records. After getting this information, ask the caller for permission to use the speaker phone. Most are comfortable with this once they understand that it allows several MG's to listen and respond to their questions. If the caller is uncomfortable, don't push it. If there are walk-in clients in the office or it is too noisy don't use the speaker phone.

4. To activate the speaker, push the spkr button on the phone. Place the receiver on the desk (not in the cradle). Speak directly and clearly.
5. Determine early in the conversation whether the call is from a COMMERCIAL GROWER (nursery, landscaper, etc.). If it is let the caller know that you will refer the call to the appropriate agent. ONLY AN AGENT CAN ADVIS COMMERCIAL GROWERS OR LANDSCAPERS.
6. NEVER hesitate to tell the client if you need to do more research in order to fully address their concerns. On occasion it will be necessary to ask the client to bring in a sample before you can answer their question. It is better to give no answer than to give the wrong one. Always call back as soon as possible. If you can't get and answer for them that same day call and let them know.

When to refer calls to an Agent:

1. A commercial client
2. You have exhausted all resources and can't find the answer.
3. You found the answer but are unsure and want confirmation form an agent.
4. You find yourself completely at a loss.
5. If any of the above is true, fill out a yellow AGENT FOLLOW-UP form found in the desk file drawer.

Recording calls in Log Book

1. Make sure you record the name of each person working in the clinic on the first entry. Thereafter you may just enter "SAME" for that day.
2. Write legibly or print. Client's name and phone #/a concise and complete explanation of the question or problem/ enter the problem code (list is posted on the bulletin board)/ record which references you used to answer question (library books by title and page #/web site/Agent or MG experience). If you are unable to answer the question indicate whether the call was referred to an agent or referred for follow-up.

When and Why to leave a Follow-up for MG's.

1. If you have successfully found the answer but the client is not home, or the client has already left the office).
2. If the question or problem is going to require further research. Be sure to leave complete information on what research you have already done.
3. The Follow up Log and orange insect sheets should be filed in the Log Book with that days sheets.

THINGS TO LEARN / DO BETWEEN CALLS

1. Familiarize yourself with the library and the reference materials.

2. Check out publications in both the Clinic and Front Office.
3. Make sure that you mail a copy, not the original and make sure you are sending the Most current information available. If you are not certain, check with Mary or Laurie.
4. Check out web sites on the computer. The most used sites on represented by a line of icons at the bottom of the computer screen.
5. Review the Insect Committee's guidelines on how to handle store and otherwise deal with specimens.
6. Practice using the microscope.
7. Locate time sheets and other pertinent items such as the calendar, cli8nic masters folder.
8. Look through the files; there is a wealth of information in them. Everything is in alphabetical order with the exception of insects. It is such a large group that we filed them all under I for insect and then in alphabetical order within that group.

CLOSING THE OFFICE

1. Make sure you give yourself enough time to complete all tasks before 4:00.
2. Call all MGs scheduled for the next clinic day. Once the outpost clinics open you will need to call them also. This applies to the Friday clinic only.
3. Organize and re-shelve any books you have used according to the Dewey Decimal System.
4. Make sure the microscope light is off.
5. Delete all phone messages that have been resolved.
6. Delete all email messages that have been resolved and shut down the computer.
7. Empty trash and scrap paper.
8. Put all pencils and pens away.
9. Take any Agent Follow-up forms to front office.
10. Turn off the coffee pot, lights and fans. Lock the office door.
11. Let the staff know you are leaving and thank them for their help.