When & How to Use Referrals

Master Gardeners provide management suggestions only when the diagnosis or identification has been finalized. All tentative diagnoses or identifications must be verified before recommendations are offered.

If you receive a question your shift cannot complete, please fill out an appropriate form so that the following shifts can continue the research and diagnosis.

When to Use 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 the call/walk-in arrived too late for your shift to complete the diagnosis
- If you would like to have your shift’s diagnosis or identification verified

When not to Use a Referral Form for phone calls and/or walk-ins
- 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

To start a Referral Form
- Tell client the question requires further research; A different Master Gardener will call back later
- Suggest the client contact the MG office again if no one calls back after 2 days
- Use the Referral form that best suits the client’s question
  - Green = Plant Problem
  - Yellow = Insect, Spider, Etc.
  - Blue = Plant for ID only
- Complete the intake information at the top and, below that, as much as possible of the history of the problem. If needed, continue onto the back side.
- Take digital photos of all client samples *(See next item)*
- Record contact in Daily Log  e.g.: Began Referral for (client’s name).
- Place Referral form and sample, the latter labeled with date and client’s name, in the designated brown folder

Take digital photos of all client samples
- Include overall, mid-range, and close-up views
  Close-up views should contain the transition zone between the affected & healthy sections
  *(See full details in How to Use the Office Camera, later in this section)*
- Transfer images to the MG FORUM IMAGES folder on the lower right of the MG Computer desktop
  *(See full details in How to Transfer Images, later in this section)*
Follow-up with Referral Forms

- Research the problem/question; if your shift resolves the Referral, notify client of answer and recommendations
- Fill out the Answer & Client Notification section, sign and date the form
- Place completed Referral form in the Archive Binder
- Record the contact on the Daily Log
  e.g.: Completed Referral of (date) for (client’s name).
- If not resolved within 2 days, upload to MG Forum (See next item)

When & how to Upload a Referral to the MG Referral Forum

- If the Referral isn’t resolved by the 4th shift after it was written, the office MGs in that shift should
  (a) Upload the Referral and pertinent images to “Incoming Referrals” in the MG Referral Forum
  Exception: Upload the Referral earlier whenever an intervening weekend or holiday exceeds the 2-day limit
  (b.) Contact the client to say that further research is required, also that s/he will be notified of the result later
  (See full details in How to Upload a Referral from the Phone Bank, later in this section)
- After the Referral is uploaded, place the Referral Form in the designated brown folder on the MG desk

Information for MG Diagnosticians (MG-Dx)

- After the Referral is online, MG-Dx have 2 days to complete the diagnosis
  If additional time is needed, the designated MG-Dx should notify the client to say
    a. Further research is required
    b. The client will be notified of the result when available
- After the MG-Dx resolve the Referral, the designated MG-Dx shall notify the following of the diagnosis and any management 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) Note the diagnosis and management on the Referral form,
    (2) Sign the form
    (3) Add the date of completion
    (4) Place the Referral form in the Referral Archives binder