Shelterly Quick Reference

Debrief

Summary

Shelterly debriefers interview field teams to gather information necessary to update Service Requests (SRs) and resolve Dispatch Assignments (DAs). Procedure may vary by organization: debriefing can be done after each field visit or at the end of the field team's shift, and can be conducted in person or remotely over the phone.

Debrief Workflow

Open the DA for the returning field team. The most common ways are:

- Use the initial map in the **DISPATCH** module. Review the list of teams under **Active** to the right of the map. Click the team and the map will now show the assigned SR addresses. Click any of the icons and the DA will open. OR
- Use the **SEARCH** module. Search Dispatch Assignments and enter the DA ID# in the first search box.

Confirm the page reads **Dispatch Assignment Summary #___** reflecting the correct DA.

Use the Actions pull-down menu to select **Resolve Dispatch Assignment**.

- Note: Changes to this page will not be saved unless **Save** or **Save and Close** are selected at the bottom of the page. Discussion of the difference between these actions is in Notes below. When in doubt or if navigating away briefly mid-task, select **Save**.
- Confirm the correct Dispatch Date appears at the top of the page (beneath team information). This should be today's date – fix it if incorrect.
- For each SR, confirm that the team went to the address. If they did not go to the address, click **Unable to Complete** (UTC) to the right of the address. Move on to next SR.
    - If appropriate, use **Instructions for Field Team** to record useful information on why visit was not completed (road closure, etc.). Do not use **Visit Notes** when UTC, as they will be discarded.
- Update **Visit Notes** based on what field team reports.
    - This is the primary field to record the field team's report. You will refer to this info when making the remaining updates listed below.
    - See Notes below for questions to ask the field team.
- Update animal statuses in pull-down menu next to the Animal #. See more in Notes below.
    - Any animal taken to a shelter should already have a status of Sheltered. If not in Sheltered status, immediate research is required. See Notes below for guidance.
        - Debriefer should <u>never</u> change an animal to Sheltered or make any changes to a shelter location. Only people at the shelter with the animal should change the status or location of an animal.
    - If a group of same-species animals appearing as a single Animal # (usually a herd or flock) needs adjusting (separating out animals with different statuses, for example), split the group using the **Actions** menu to the right of the Animal #. See more in Notes below.

    - Note: If the SR is an Operation SR (i.e. does not contain any animals), you will use the **Operation Status** pull-down to update the Operation SR to either **Keep Open** or **Close**, depending on whether additional visits to the service address are needed.
- Change the **Priority** if needed.
- Check that the **Date Completed** reflects the correct date.
- Enter the next **Followup Date** for animals with status of SIP or UTL.
    - Refer to organization procedures for standard followup intervals for different situations (SIP, UTL with no signs of life, UTL with signs of life, checking traps, etc.)
    - The default followup interval is set on the **Edit Incident** page. See ***Shelterly Quick Reference – Incident Managment*** for how to change this setting.
- Review **Instructions for Field Team** for accuracy (based on team's report) and adjust if necessary.
    - Add any new entry to the end of the existing entry and precede it with today's date.
    - If the Instructions get too long or confusing, delete older text and rewrite for clarity. Precede with today's date.
        - If you want to preserve the older text, move to **Visit Notes** with explanatory note.
- Indicate whether the **Owner** was contacted by the field team.
- Click **Save** or **Save and Close**, as appropriate.

Notes

Save vs. **Save and Close**

- Nothing is saved unless one of these buttons is selected. When in doubt or to ensure any entries are preserved, select **Save**.
- Use **Save** when you want to save everything you've entered. The DA remains in **Open** status.
- Use **Save and Close** when all the information regarding the DA is entered.
    - DAs can't close if an animal is in any of the three Reported statuses.
    - Some organizations' procedures (often with a trainee Debriefer) require a second person to select **Save and Close** after approving the saved DA.
    - After selecting **Save and Close**, the DA's status becomes **Closed**, and any SRs in the DA will no longer be **Assigned**.
- Dispatch Assignments can be reopened if closed accidentally. Go to the DA and use the pull-down menu to select **Reopen**.

Visit Notes vs. Instructions for Field Team

- **Visit Notes** is the preferred field for entering the entire report from the field team. **Visit Notes** can then be referred to while filling in the other fields on the **Dispatch Assignment Resolution** page.
- You will need to consider if any of the information you entered into **Visit Notes** needs to be added to the **Instructions for Field Team** – think about the key points that the next team needs to know.
    - Example: Field team reports that the driveway is covered with nails. Enter this information into the **Visit Notes**, and then add a note in the **Instructions for Field Team** that the next team should walk up the driveway to avoid a flat tire.

Managing Groups and Splits

When a SR includes multiples of the same animal type (e.g. 20 chickens or 10 rabbits), the animals may be entered as a group. The SR and DA will show one Animal # and the description will be the quantity and animal species. The field team outcomes often require splitting the group.

- If the count of animals in the group is correct and they all had the same outcome, you do not need to split the group.
- If animals in the group had different outcomes, split the group.
  - Select the **Actions** pull-down menu next to the animal status and select **Split Animal Group**.
    - Use the slider to specify the size of the split-off group.
    - Note that the newly created group will not be assigned an Animal # until you select **Save**.
  - Example: Group is 20 chickens. The team counted 18 chickens alive, 1 deceased, and 1 missing. Debrief will split the group into 3 statuses: 18 SIP, 1 Deceased and 1 UTL.
    - Use the slider to split into two groups – 1 group of 19 and 1 group of 1.
    - Split the group of 19 again – 1 group of 18 and 1 group of 1.
    - Update the statuses – the group of 18 is SIP, the first (new) group of 1 is UTL, and the second (new) group of 1 is Deceased.
    - Select **Save** or **Save and Close**.

Adding extra animals found by field teams

When in the field, teams will sometimes come across more animals than expected who need evacuation or shelter in place.

- Animals picked up and taken to the shelter.
  - When an extra animal goes to the Shelter, they are processed into Shelterly by Intake operators at the Shelter. Note the extra animal pickup in **Visit Notes**.
- Animals who remain where they are but need food and water (SIP).
  - If the address of the extra animal(s) is the same as an existing SR, add the animal to the SR by using the + sign next to the word Animals on the DAR page.
  - If the address of the extra animal(s) is new or if you are unsure they belong to the same owner, create a new SR using the **HOTLINE** module. Select **Non-Owner Calling** and enter the Field Team as Reporter.
    - See ***Shelterly Quick Reference – Creating a Service Request***

Animal Statuses

- **Reported.** There was a report of an animal but no field team has visited the property yet. Can be Reported, Reported (Evac Requested), or Reported (SIP Requested).
  - The DA cannot be closed while any animal in an SR assigned to the DA is in any Reported status.
- **Sheltered in Place (SIP).** This animal is at the home address and is getting food and water on a regular schedule. Requires a followup date.
- **Unable to Locate (UTL).** The Team was unable to find the animal. Food and water should be left. Requires a followup date.
- **No Further Action (NFA).** This option only shows in the pull-down menu when the animal has previously been in the UTL status. Change status to NFA according to procedure set by your organization.
- **Sheltered.** The animal is in a shelter, at a veterinary hospital, in foster care, or otherwise contained.

- **Reunited.** The animal has been reunited with their owner. This is also used when the evacuation order is reduced to a warning, and we've confirmed the owner is back home.
- **Deceased.** Used when the animal is confirmed to be deceased.

See ***Shelterly Quick Reference – Statuses*** for additional detail.

Suggested Debrief Questions

- For SIP and UTL
    - Did you leave food and water (f/w)? Has the food been reset and water refilled? If not obvious, where are they on the property?
    - Is there food/water/medicine available on property? How much? Where does the next team find the food/water/medicine?
    - Any concerns about the condition of the animal(s)?
    - How many days until the next visit is needed?
    - Was the food touched? Any other signs of life?
    - What's the number of the camera? What is the location of the trap?
- Property condition
    - Is the house standing? Is there power?
    - Any issues with accessing the property?
    - What sort of PPE is needed to access the property?
- Owner info
    - Is the owner on site?
    - Did you contact the owner? (Field teams need to attempt to contact Owners with outcomes to assure them that efforts are being made.)
- Did you leave signage?
- What should the next team bring with them?
- Are there any special instructions for the next team?

Team members

- Mobile phone numbers for team members are found in the first box on the Dispatch Assignment Summary. This is also where you can edit team members or their information.
- You can add new field team personnel from the **Deploy Teams** page using the + sign at the far right of the Team section.
    - See ***Shelterly Quick Reference – Incident Management*** for details on adding Team Members.

Balance the workload

- When setting followup dates, be conscious of balancing the calls so each day has a reasonable amount. This may mean setting some followup days for the next day instead of setting all of them for two days. Work with Dispatch to even out followup dates for optimal field team assignments.

Sheltered but not showing Sheltered

- If an animal taken to a shelter is not in a Sheltered status, it's urgent that someone start tracking the animal.
- Double check animal facts. Is there a mistaken status on any other animals in the DA?
- Call the shelter and research the intake for that DA and that team.

- Anytime the wrong status is entered for an animal, stop and think through how to fix the situation. Agree with the shelter on the actions you will both take.
- The debriefer should <u>never</u> change an animal to sheltered or make any changes to a shelter location. Only people at the shelter with the animal should change a status or location to an animal.

Coming Soon

- *The Owner Contact fields will be replaced on the DA Resolution page with an Owner Contacted toggle. Owner comments should be captured in the Visit Notes. Owner contact fields will still be available and used by Hotline and Shelter modules.*