Shelterly Quick Reference

Incident Management

Summary

Shelterly incident management is performed by a Shelterly administrator with Incident Permissions. (Refer to ***Shelterly Quick Reference – User Management*** for how to grant these permissions.)

Training vs. Real Incidents

Each incident in Shelterly is either a Training or Real incident. The intended usage is that Training incidents can have fake data and are used for trainings and hands-on practice. Real incidents should only ever have real data, and should reflect a real-world incident.

Key points:

- The Shelterly development team is automatically notified whenever a new Real incident is created, so that they can be ready to assist with any technical support needed.
- Certain types of data in Shelterly are associated with either Real incidents or Training incidents, depending on which kind of incident they were created in:
    - Shelters
    - Owners
    - Team Members (on the Deploy Teams page)

  For example, if a Shelter is created in a Real incident, then that shelter will be accessible from *all* Real incidents, but not from any Training incidents. If an Owner is created in a Training incident, then that owner info is available in *all* Training incidents (via Use Existing Owner), but not in any Real incidents.

  Note: If you change a Training incident to a Real incident (a very uncommon scenario), then all Shelters, Owners, and Team Members previously created in that Training incident would then be available in all Real incidents. In general, an incident should not be changed from Training to Real, or from Real to Training, once it has data in it.
- Training incidents can be recognized by the Ⓣ symbol next to the incident name.

Startup

Incident management features are accessed by selecting **Create Incident**, **Edit Incident**, or **Hide Incident** on the **Select Incident** page.

- The **Select Incident** page appears after the **Login** page (and also after the **Select Organization** page if you are a Shelterly User in multiple organizations).
- If you are already logged into Shelterly, you can return the **Select Incident** page by selecting the incident name under the Shelterly logo.

Creating a New Incident

- Select **Create Incident** on the **Select Incident** page.
- **Name**: Give the incident a meaningful name, such as Park Fire.

    - Shelterly will automatically add today's date to the incident name, e.g. "Ranch Fire (09/15/2025)"
- **Description**: This description will appear on the incident home page of Shelterly to all Shelterly Users.
    - For Real incidents: This is a useful place to put links, instructions, or other information that your Shelterly Users need to know.
    - For Training incidents: Enter instructions about how this Training incident is intended to be used.
- **Default Followup Days**: This is the default followup date interval for SRs on the DA Resolution page (typically 1 or 2 days early in the incident, lengthening to 2 or more days for ongoing SIP visits to properties).
    - This default interval can be overridden on an individual SR basis on the DA Resolution page.
    - This default setting can be edited as the incident progresses to reflect current conditions.
- **Lat/Lon**: Click on the map to drop a pin – you can drag the pin if needed to adjust. Pick a central location for the incident, such as your organization's staging or shelter location.
    - The purpose of associating a lat/lon with the incident is to help Shelterly make better choices when it is trying to disambiguate street addresses in Service Requests (e.g. picking the "123 Main St." in your local city rather than one a thousand miles away).
    - Once you have created at least one incident in your organization, Shelterly will center the map on this page on the averaged Lat/Lon locations of all previous incidents.
- **Refine Incident Lat/Lon Point**: This gives you a visual way to customize the lat/lon for the incident.
- **Training**: Drag the slider to the right to make this a Training incident.
- Select **Save** to create the incident.

Editing an Incident

- Choose an incident from the **Select Incident** pull-down, then select **Edit Incident**.
- You can edit all incident fields referenced in Creating a New Incident above.
- Select **Save** to save your changes.

Hiding and Removing Incidents

If you have a large number of Shelterly Users, it's a good idea to manage the visibility of your incidents to reduce the chance of someone picking the wrong incident from the **Select Incident** pull-down.

Hiding Incidents

- Hiding an incident removes it from the **Select Incident** pull-down for all users who do not have Incident permissions. Hiding an incident does not affect it in any other way. Use Hide for Real incidents that have concluded.
    - Shelterly Users with Incident Permissions will still see the hidden incident in the **Select Incident** pull-down. Today's date will be appended to the incident name and creation date when it is hidden, e.g. "Ranch Fire (09/15/2025 – 09/22/2025)"
- To hide, choose an incident from the **Select Incident** pull-down, then select **Hide Incident**.
- To unhide, choose a hidden incident from the **Select Incident** pull-down, then select **Show Incident**.

Removing Incidents

- Removing an incident removes it from the **Select Incident** pull-down for all users, even those who have Incident permissions.

- The incident still exists in Shelterly, but can only be restored by contacting the Shelterly team and giving them the name of the incident.
- Use only for incidents you do not intend to access again, typically an unneeded Training incident, or a mistakenly-created Real incident.

- To remove, choose an incident from the **Select Incident** pull-down and select **Edit Incident**. Then select **Remove Incident**.

Setting up Team Members

Shelterly allows you to create and manage Team Members who can be assigned to Dispatch Assignments on the Deploy Teams page.

Team Member Overview

- Shelterly Team Members typically correspond to your organization's approved Evac (or Field) team members.
- It's a good idea to set these up in advance of a real incident to save time.
- Team Members must be set up separately for Training incidents and Real incidents.
- Team Members are completely independent from Shelterly User accounts – you can have a Team Member who is not a Shelterly User, or a Shelterly User who is not a Team Member.

Creating Team Members

- Make sure you are in a Training incident if you are setting up Team Members for your Training incidents, or in a Real incident otherwise.
- Select the **Add Team Member** icon (the + symbol) on the **Deploy Teams** page in the **Dispatch** module.
  - Enter first/last name and phone.
  - **Agency ID**: Optional. Can be used for the Team Member's individual ID # within your organization. It is also useful when you have Team Members during an incident from multiple mutual aid agencies – just put in the agency name (NVADG, Napa CART, ASPCA, etc.)
  - Select **Save**.
- Alternatively, if you have a lot of Team Members to create, select **Team Management** in the **Dispatch** module. Then select the **Create New Team Member** icon. Fill in the fields as above, then select **Add Another** or **Save** when you are done.

Editing Team Members

- Select **Team Management** in the **Dispatch** module.
- Select the icon to the left of the individual Team Member's name, then edit the fields and select **Save**.

Hiding and Deleting Team Members

- Hiding a Team Member stops them from appearing in the **Choose Team Members** pull-down in the **Deploy Teams** page.
  - To hide, select **Team Management** in the **Dispatch** module, then select the Hide icon (the eye symbol) next to the Team Member's name.
  - To unhide, select the Hide icon again (the eye symbol with a line through it).
- Deleting a team member permanently permanently deletes them from Shelterly. Delete should only be used for Team Members created in error. (Hide is a better option for all other cases.)

    - To delete, edit that Team Member (see Editing Team Members above) and select the **Delete** icon (the x symbol).
    - Note: Never delete a Team Member who has ever appeared in a Dispatch Assignment – you will lose your historical data about who visited the property.

Wrong Incident Issues

One of the most common errors in using Shelterly is mistakenly working in the wrong incident.

- Users can cause problems by bookmarking pages within a specific incident, and trying to reuse those bookmarks later during a different incident.
    - Train users to bookmark only one page – the Shelterly **Login** page.
- Users may forget to double-check that they selected the correct incident when logging in.
    - Train users to visually verify the incident name under the Shelterly logo after logging in.
    - Train users to check that they are in a Training incident before entering any fake or practice data.

Notes

Handling simultaneous incidents in your jurisdiction

When your organization is responding to two or more incidents at the same time in your local jurisdiction, you will need to decide whether to create one or multiple incidents in Shelterly. Considerations:

- If two named fires are burning close to each other, and you are using the same field teams, staging area, and shelters to support both fires, then create a single incident in Shelterly.
- If two fires are burning in different parts of your county, with two separate staging areas and different personnel assigned to each fire, then create two incidents.
- If two incidents are likely to have different end dates, create two separate incidents in Shelterly.
- Each Shelterly incident can only be linked to one CalTopo map. If you have different CalTopo maps for the two incidents, then create two incidents in Shelterly.

Naming conventions for Training incidents

- To reduce the chances of Shelterly users putting Real incident data into a Training incident, consider putting the word “Training”, “Practice”, or similar into the name of the incident.
- Example naming convention:
    - For Training incidents to be used during a scheduled Shelterly training session:
        - 2025.03.30 Training Incident
    - For Training incidents intended to be used at any time for hands-on practice:
        - Practice Incident A
        - Practice Incident B
        - etc.
    - For Training incidents intended to be used by new Shelterly Users to qualify for a Shelterly role with your organization:
        - Qualification Self Study Incident

ID #s in incidents

- Each new incident will restart the ID numbers at #1 for Animals, SRs, DAs, and VRs (Vet Requests).
- Owner IDs are unique across an entire organization (they do not reset to #1 in each incident).