



Shelterly Quick Reference

Editing a Service Request

Summary

Hotline Operators or other Shelterly users may need to add information to or alter existing Service Requests. This guide describes both common edits (updating animal description or adding an owner) as well as advanced edits (changing animal status, assigning or reassigning SRs to DAs, edits to SRs assigned to an open DA which can require knowledge of Debrief procedures, see Notes for more). Users should exercise caution and not perform actions outside their role or authorization level.

Service Request Page

Access the **Service Request #** page with **Search** or click on the service request address on the **Owner Details** or **Animal #** pages.

- **Information**
 - Use the **Actions** pulldown to
 - **Update Service Request**
 - To edit or add information within the SR, such as followup date or property accessibility information.
 - **Add Service Request Note**
 - Used to provide additional information not provided in **Visit Notes**.
 - Could be notes explaining a complicated situation or additional information not essential for the **Instructions for Field Team**.
 - **Assign (or Resassign) Service Request to DA**
 - Only if authorized, often as part of Debrief.
 - **Cancel Service Request**
 - Only if authorized – usually if created in wrong incident.
 - Select the calendar icon next to **Followup Date** to change the requested date.
- **Contacts**
 - To add an owner, select the person icon next to **Contacts** title.
 - To access the **Owner Details** page, select the owner name.
 - Instructions for editing the **Owner Details** page below.
- **Animals**
 - Use the **Actions** pulldown to
 - **Add an Animal** to this SR.
 - **Reunite all Animals** with their owner at the end of an incident.
 - **Transfer an Animal** to a different SR.
 - To access an individual animal's page, select that animal.
 - Instructions for editing the **Animal #** page below.
- **Photo Documents**
 - Images of documents or property. Images of the animal are added to the animal's page instead.
- **Visit Log**
 - Updated by authorized dispatch/debrief personnel as part of debrief and are not directly editable from the SR page.
 - If authorized (assisting a field team remotely during a DA, for ex) can be edited via the **DA Summary**, see Notes below or *Shelterly Quick Reference: Debrief* for more.

Owner Details Page

Access the **Owner Details** page via **Search** or by selecting the owner name on the **Service Request #** page or the **Animal #** page.

- **Information**
 - Use the **Actions** pulldown to access the **Update Owner** page.
 - After editing, enter a reason in **Change Reason** (such as “correcting last name spelling”).
 - Select **Save**.
- **Contact Log**
 - Select the phone icon to **Add an owner contact note**.
 - Initial the owner contact note to indicate which user created it.
- **Animals**
 - Select the person icon to **Add another owner to all of these animals**.
 - Select the house icon to **Reunite all animals with this owner**.
 - Only by authorized user. Procedure may vary by organization.
 - Select the individual animal to access that **Animal #** page.
 - Instructions for editing the **Animal #** page below.
- **Photo Documents**
 - Images of documents or property. Images of animals are added to the animal’s page instead.

Animal Page

Access the **Animal #** page via **Search** or by selecting the animal on the **Service Request #** page or the **Owner Details** page.

- **Information**
 - Use the **Actions** pulldown to
 - **Update Animal**, including adding description details or pictures of animal.
 - **Split Animal Group**
 - Will only appear for an animal group, which are created using **No. of Animals**.
 - Used to reshape animal groups, such as splitting one off for medical treatment, splitting into two groups sheltered in different locations or into individual entries for each animal.
 - **Reunite Animal**
 - Only by authorized user. Procedure may vary by organization.
 - **Create Veterinary Request**
 - Can be used by shelter workers to flag veterinary concerns.
 - Will only appear for individual animals. If working with an animal group, first split the group as described above.
 - **Cancel Animal**
 - Only if authorized – usually if created in error and doesn’t exist.
- **Contacts**
 - Select the person icon to **Add another owner to this animal**
 - Select the owner name to access the **Owner Details** page.
 - Instructions for editing the **Owner Details** page above.

Notes

Special case: If the SR is assigned to an open DA, certain parts of the SR may need to be edited using Debrief procedure. In those cases,

- Select the DA using the date link near the bottom of the SR
- On the DA page, select **Actions**, then Resolve **Dispatch Assignment**
- Edit the SR
- **SAVE** (not **SAVE AND CLOSE**)
- See *Shelterly Quick Reference: Debrief* for more details on this procedure.

Avoid deleting information from an SR. If adding new information to a note box, add it to the end of the previous information and begin the addition with "UDPATE [TODAY'S DATE]:". Paste anything deleted from **Instructions for Field Team** in an **SR Note** as a record.