



# Shelterly Quick Reference Note Fields

## Summary

Shelterly uses multiple note fields, primarily associated with the Service Request (SR), each used for specific information.

## Owner Information

### Comments/Alternate Contact

- Use if there is relevant information available, such as: prefers to be contacted over email or ESL – Spanish preferred, or if another contact should be listed here.
- In some cases, the individual listed as owner may in fact be a friend or relative of the owner, while the actual owner prefers not to be contacted. In that case enter the owner's name here if available and indicate the relationship between the named parties.

### Owner Contact Notes

- Add using the phone icon in **Contact Log**.
- Use to briefly record direct conversations or attempts to reach the owner (or owner's contact person).
- Initial each note to indicate author.

## Animal Information

### Breed/Description

- Use to specify breed (Rottweiler, Pomeranian) or other helpful descriptor (similar to other horse but with narrower white blaze).
- If species is "other" list species both here and in **Instructions for Field Teams** on the **Service Request** page.

### Animal Notes

- Enter relevant behavioral or handling instructions, such as "wary of men", "aggressively friendly" or "reluctant to load, use carrots as lure".

### Medical Notes

- Enter relevant medical information, such as "requires daily Equioxx, find in barn on top of red shelf" or "cone and bandage due to recent foxtail injury".

## Service Request Information

### Instructions for Field Team

- Use for directions necessary to find or access the location, such as landmarks or gate codes.
- If owner is able to meet to hand off key, indicate here.
- Any information previously entered that may need highlighting can be repeated here, such as "blind horse wary of men" or "other" species information.

### Service Request Notes

- Add using the Actions menu in an existing SR.

- Service request notes are used to add additional information other than that from **Visit Notes**.
- Examples: a note that this SR still needs a liability release, or notes on complex or unclear SR situations. Ex: an UTL chicken that a neighbor says was evacuated by a first responder, that a different first responder reported was reunited with owner, but the owner tells us is still UTL, we might use **Service Request Notes** to chronicle our understanding of the situation and steps we've taken to assist.
- In longer activations, **Instructions for Field Team** may become too long/full to easily scan. In those cases, move less-relevant information to **Service Request Notes**.

#### **Visit Notes**

- Notes from field team on each visit, created as part of the Debrief DA resolution process.
  - Ex: UTL, intact fw, fresh fw left, no signs of animal activity.
  - While debriefing, all visit notes are recorded here, then the debriefer can decide what should also go in other relevant fields.
- In certain cases when an SR is assigned to an open DA, users can edit the **Visit Notes** as follows.
  - 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.