



# Shelterly Overview

February 2025

# What is Shelterly?

- Shelterly is an animal disaster response technology organization
  - Provides mutual aid, preparedness training, and operational resources to animal response teams, municipal shelters, and communities
  - Shelterly nonprofit founded by Trevor Skaggs
  - *Shelterly streamlines animal response information so teams can focus on helping animals*
- The Shelterly platform is an animal disaster response operating system
  - Supports management and tracking of animals throughout an entire incident (hotline call, field operations, sheltering, veterinary care, and reunification)
    - Improves efficiency and reduces manual processes and errors
  - Cloud-based software
  - Created in the aftermath of the 2018 Camp Fire, to address the paperwork inefficiencies of caring for over 10,000 animals



# Why Shelterly?

- Proven in the field and trusted by frontline responders
  - Successfully deployed in:
    - 2023 Lahaina Fire (Maui)
    - 2024 Apache, Thompson, and Park Fires (Butte county)
    - 2025 Eaton and Palisades Fires (LA county)
- Designed to reduce administrative burdens so teams can focus on saving lives
- User-friendly technology that works even in high-stress scenarios
- Scalable and flexible to meet the evolving needs of disaster response organizations

Emerging standard for CARTs, endorsed by Cal CARTs

Those who have tried Shelterly say: **“Never going back to the old way”**




# Shelterly Training

- Shelterly Overview (this presentation)
  - Awareness of main Shelterly workflows and how they are used
  - Awareness of how data is organized in Shelterly
  - Awareness of different Shelterly operator roles
- Hands-on Trainings – demo and hands-on practice
  - Hotline
  - Intake
  - Dispatch
  - Debrief
  - Vetmed
  - Admin
- Shelterly Quick Reference document library



**SHELTERLY**  
Training Incident A


 **HOTLINE**

 **DISPATCH**

 **SHELTER**

 **VETMED**

 **SEARCH** ▾

 **REPORTS**

 **SIGN OUT**

# Shelterly Workflow

1. **Enter Service Requests (SRs)** via Hotline workflow
2. **Assign SRs to Evac teams (Dispatch)** via Deploy Teams workflow
  - Use map to group SRs together
  - Evac teams take printout of Dispatch Assignment and make notes on printout
  - Additional SR assignments delivered to field team via radio and/or pdfs in WhatsApp or other app
3. **Intake animals at shelter** via Shelter workflow
  - Update status of each animal and enter their shelter location
  - Can intake animals delivered by an Evac team, or can intake directly from members of the public bringing animals to shelter
4. **Debrief Evac teams** as they return to staging via Resolve Dispatch Assignment workflow
  - Update all SRs – animal status, visit notes, follow-up date
5. (As needed) **Initiate veterinary care** via Vet Request workflow
  - Creates Medical Record (MR) for animal, vet can then enter exam notes and make treatment plan

# Data in Shelterly

## Searchable Items – each has unique ID#

- Service Requests (SRs)
- Animals
- Owners
- Dispatch Assignments

## Managed by Shelterly Admin

- Shelterly Users (login credentials and permissions)
- Shelters
- Team Members (of Evac Teams)
- Incidents
  - Training vs. Real Incidents: Shelters and Team Members created in a Training incident are accessible in all other Training incidents, but not in Real incidents (and vice versa)

Training  
incident



# Shelterly Roles: Hotline Operator

- Duties: Answers phone and gets all SR information from caller
- Location: Can be at Staging or remote
- Notes: Can enter info directly into Shelterly during call, or fill out paper Shelterly SR form and then transfer info into Shelterly after call complete.

**SHELTERLY**  
Training Incident A

**HOTLINE**

**DISPATCH**

**SHELTER**

**VETMED**

1 Create Contacts  
0 Contacts Created

2 Create Animals  
0 Animals Created

3 Create Service Request

← Owner Information

Use Existing Owner

Search...

First Name\* Last Name\*

Phone\* Alternate Phone Drivers License Email

Comments / Alternate Contact

# Shelterly Roles: Intake Specialist

- Duties: For animals brought by Evac, updates animal status/location; for animals dropped off by public, enters all animal and owner info
- Location: At Shelter
- Notes: Ideally uses tablet for data entry at Evac's or Owner's vehicle.

The screenshot shows the Shelterly app interface for Valleybrook Equestrian Center. On the left is a dark sidebar with navigation options: SHELTERLY Training Incident A, HOTLINE, DISPATCH, SHELTER, and VETMED. The main content area has a dark header with the title 'Valleybrook Equestrian Center - Shelter Details' and an edit icon. Below the header are two columns of information. The left column, titled 'Information', lists: Address: 1132 El Centro Avenue, Napa, CA 94558; Phone: (707) 555-5555; Currently Sheltering: 0 Animals; and Description: None. The right column, titled 'Intake', lists: Intake from Walk-In (Owner), Intake from Walk-In (Non-Owner), Intake from Dispatch Assignment, and Roomless: 0 Animals. At the bottom, a 'Buildings (1)' section shows 'Section A' with 3 Rooms and 0 Animals.

## Valleybrook Equestrian Center - Shelter Details

**Information**

Address: 1132 El Centro Avenue, Napa, CA 94558

Phone: (707) 555-5555

Currently Sheltering: 0 Animals

Description: None

**Intake**


Intake from Walk-In (Owner)

Intake from Walk-In (Non-Owner)

Intake from Dispatch Assignment

Roomless: 0 Animals

**Buildings (1)**

	Section A
	3 Rooms
	0 Animals



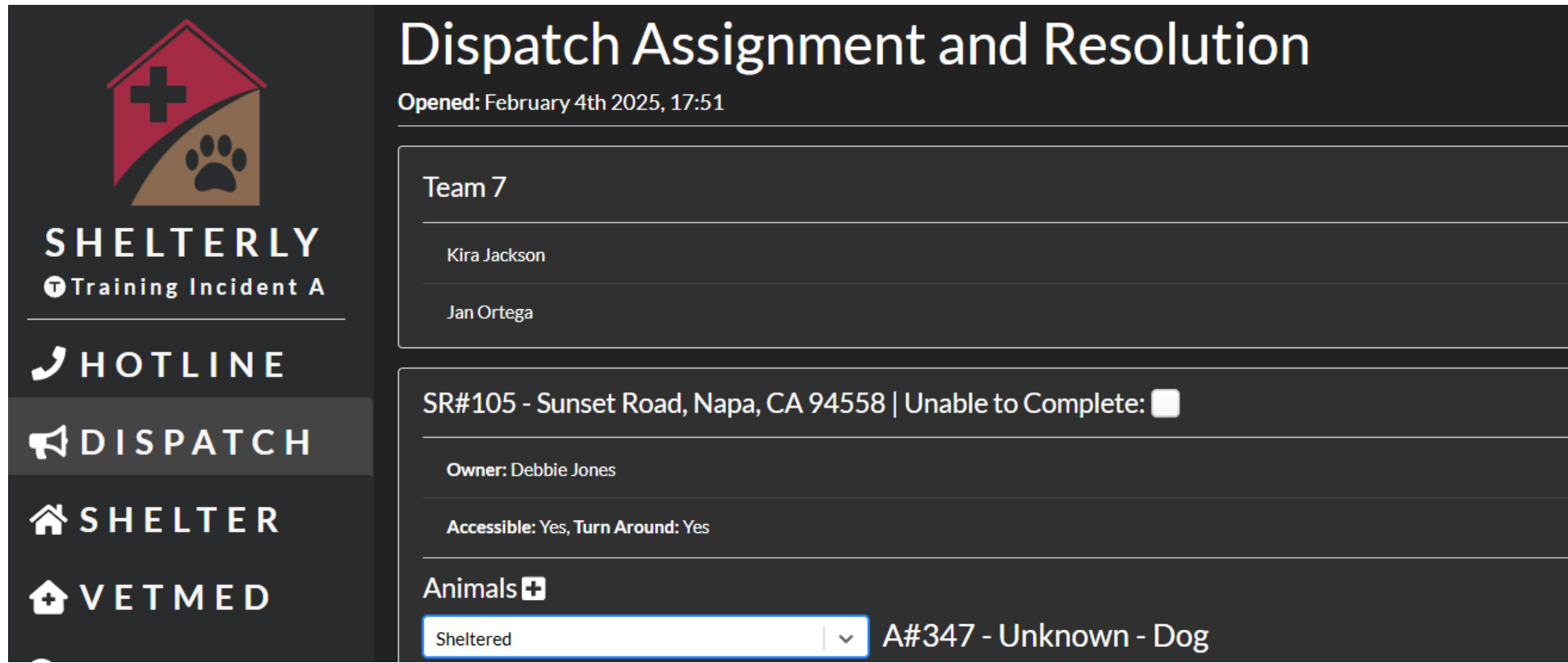
# Shelterly Roles: Dispatcher

- Duties: Batches SRs by location and/or resources needed, and assigns to Evac teams (with input from Operations Chief / Animal Branch Director)
- Location: At Staging
- Notes: This role is typically separate from Comms / Scribe / Tracking Board roles. Shelterly Dispatcher asks Comms to convey new assignments to teams in field.

The screenshot displays the Shelterly Dispatch interface. On the left is a dark sidebar with a logo featuring a red house with a white cross and a brown paw print. Below the logo, the text reads "SHELTERLY" and "Training Incident A". The sidebar contains several menu items: "HOTLINE", "DISPATCH" (highlighted), "SHELTER", "VETMED", and "SEARCH". The main area is titled "Deploy Teams" and features a map of a rural area with green fields and blue water. A red location pin is placed on the map near "Sunset Road" and "Congress Valley Road". Below the map is a "Selected" list, a "DEPLOY" button, and a "Team 19" selection box with a "Choose team members..." dropdown. At the bottom, there is an "Options" section showing "5 Alpacas" and "SR#86 - Sunset Road, Napa, CA 94558".

# Shelterly Roles: Debriefer

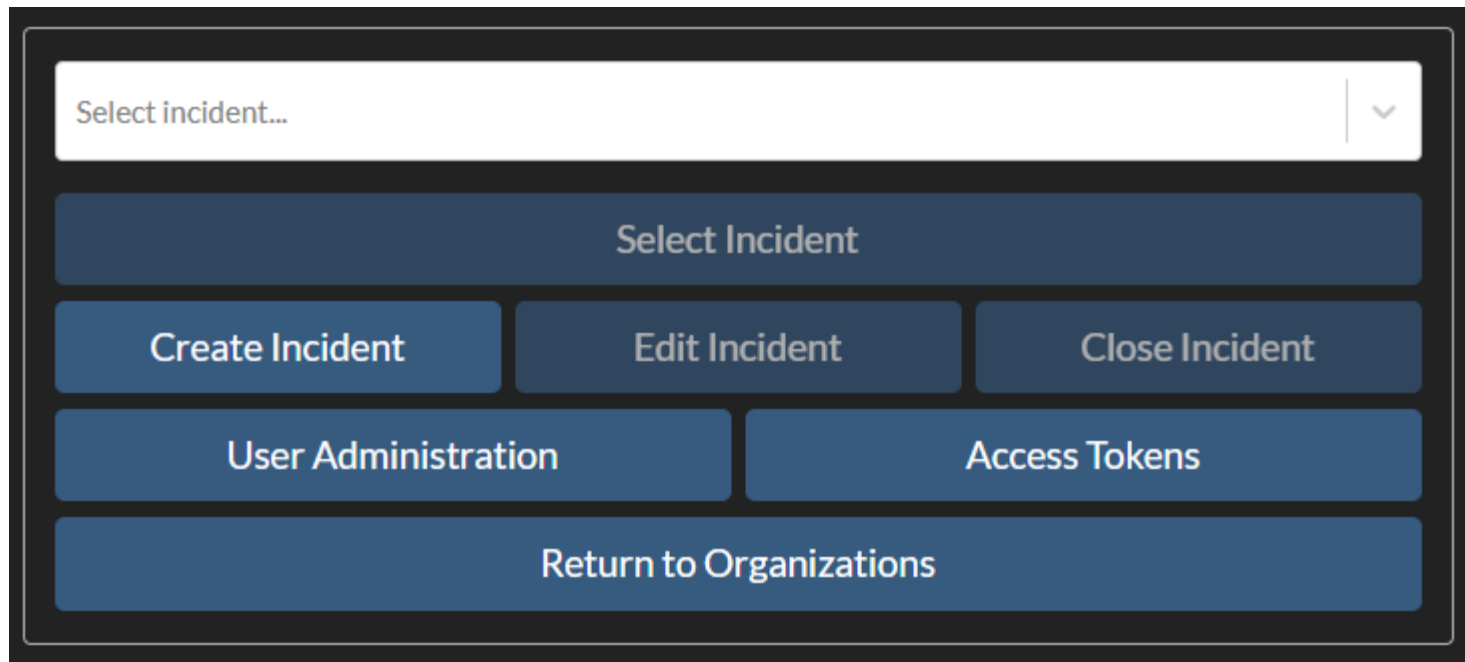
- Duties: Interviews returning Evac teams and enters all updates into Shelterly
- Location: Can be at Staging or remote
- Notes: For small/medium incidents, Dispatcher and Debriefer are typically the same person.



The screenshot displays the Shelterly interface. On the left is a dark sidebar with a logo featuring a red house with a white cross and a brown paw print. Below the logo, the text reads "SHELTERLY" and "Training Incident A". Further down are menu items: "HOTLINE", "DISPATCH" (highlighted), "SHELTER", and "VETMED". The main content area has a dark background with the title "Dispatch Assignment and Resolution" in white. Below the title, it says "Opened: February 4th 2025, 17:51". A section titled "Team 7" lists "Kira Jackson" and "Jan Ortega". Below that, the incident details are shown: "SR#105 - Sunset Road, Napa, CA 94558 | Unable to Complete: ". Further down, it lists "Owner: Debbie Jones" and "Accessible: Yes, Turn Around: Yes". At the bottom, there is an "Animals" section with a plus icon, a dropdown menu showing "Sheltered", and the text "A#347 - Unknown - Dog".

# Shelterly Roles: Shelterly Admin

Creates incidents, manages Shelterly user access, creates shelters, etc.



The screenshot displays a dark-themed user interface for the Shelterly Admin role. At the top is a white search bar with the placeholder text "Select incident..." and a downward arrow icon. Below the search bar is a large, dark blue button labeled "Select Incident". Underneath this are three smaller, dark blue buttons: "Create Incident", "Edit Incident", and "Close Incident". Below these are two more dark blue buttons: "User Administration" and "Access Tokens". At the bottom is a wide, dark blue button labeled "Return to Organizations".

# Shelterly Roles - Recap

- Hotline Operator
  - Duties: Answers phone and gets all SR information from caller
  - Location: Can be at Staging or remote
  - Notes: Can enter info directly into Shelterly during call, or fill out paper Shelterly SR form and then transfer info into Shelterly after call complete.
- Intake Specialist
  - Duties: For animals brought by Evac, updates animal status/location; for animals dropped off by public, enters all animal and owner info
  - Location: At Staging
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- Dispatcher
  - Duties: Batches SRs by location and/or resources needed, and assigns to Evac teams (with input from Operations Chief / Animal Branch Director)
  - Location: At Staging
  - Notes: This role is typically separate from Comms / Scribe / Tracking Board roles. Dispatcher asks Comms to convey new assignments to teams in field.
- Debriefer
  - Duties: Interviews returning Evac teams and enters all updates into Shelterly
  - Location: Can be at Staging or remote
  - Notes: For small/medium incidents, Dispatcher and Debriefer are typically the same person.
- Shelterly Lead – creates incidents, manages Shelterly user access

# Shelterly / CalTopo Integration

## Shelterly integrates with CalTopo Team Account

Shelterly Service Requests can be exported to the shared CalTopo incident map

## CalTopo map capabilities include:

- Real-time location sharing from each field team to the incident map
- View locations of Shelterly Service Requests
- View road closures and other hazards (as identified by Evac teams or Planning)
- Offline map downloads for use by field teams when no cell signal

# Next Steps

- Obtain a Shelterly User login from your Shelterly Lead or Admin
- Login to Shelterly (<https://app.shelterly.org>)
- Practice the different workflows
  - Only use Training incidents (not Real incidents) when practicing
- Use Chrome browser for best performance
- Always verify you are in the correct incident
  - Avoid using bookmarks