



Shelterly Quick Reference Shelter – Intake

Summary

A Shelterly user at the shelter uses Intake to accept animals arriving via owner or non-owner drop-off or as part of a Dispatch Assignment.

Access Intake Workflow

- Select the **SHELTER** module and then the correct Shelter location.
- Select **Intake from Walk-In (Owner)**, **Intake from Walk-In (Non-Owner)**, or **Intake from Dispatch Assignment** as appropriate.

Intake from Dispatch Assignment

Select the correct DA from the pull-down menu.

- For each animal in each service request within the DA:
 - If animal is NOT part of the intake, do not change their status.
 - For all animals NOT part of the intake, such as those SIP, UTL, or going to a different shelter, status changes will be handled elsewhere by the debriefer or the destination shelter.
 - If animal IS part of the intake, change that animal's status to **Sheltered**.
 - Confirm the appropriate shelter is displayed.
 - **Room**: Select if appropriate.
 - **Triage**: Use to indicate urgency of care needed. Default is **Green**.
 - **Save**
 - If intaking an animal from the field team who does NOT appear on the DA, such as a wandering animal or one left off the initial SR, use **Intake from Walk-in (Non-Owner)**.
 - Use the plus icon to **Add a new animal to this dispatch assignment** only if 100% confident the additional animal belongs to the same owner. If any doubt, use **Intake from Walk-in (Non-Owner)**.

Intake from Walk-in (Non-Owner)

Enter reporter information.

- If owner information is available, select **Add Owner** then skip to **Owner Information** below.
- If owner information is unavailable, select **Next Step** then skip to **Animal Information** below.

Intake from Walk-in (Owner)

Owner Information page

- Use **Use Existing Owner** to see if the owner is already in Shelterly.
 - If the owner name appears in the pull-down, select and confirm that the saved information is correct.
 - If the owner name doesn't appear, delete any entry in **Use Existing Owner**. Move to **First Name** and subsequent fields to enter the owner's information.

- Use **Search for Contact Address** to type address, then select the matching verified address from the pull-down menu.
- Select **Next Step** to continue to **Animal Information**.

Enter Animal Info

Animal Information page (some of this may happen after the initial intake process)

- If species is not listed, select **Other** and enter species in **Breed/Description**.
- **Breed/Description:** Use for identifying information, such as “Rottweiler” or “calico”.
- **Animal Notes:** Use for handling information, such as “wary of men”.
- **Medical Notes:** Use for relevant medical information, such as “one daily Equioxx”.
- **Triage:** Use to indicate urgency of care needed.
 - **Green** is default/stable. **Red** needs immediate care. **Yellow** needs care but can wait.
- **Microchip Number:** If available.
- **No. of Animals:** Use for quickly entering a group of animals, such as a herd or flock.
- **Front-Shot** and **Side-Shot:** used only for pictures taken by field team or shelter.
 - In future, Shelterly will accept owner-supplied photos, but currently only uses photos taken while animal is in our care. To do otherwise can lead to miscommunication and confusion.
- Select **Add Another** to add another animal from the same owner.
- Select **Save and Finish** after all animals have been added.

Notes

- Depending on your organization, you may print Animal Information form and/or Liability forms. Liability forms require owner signature.
- Your organization will establish a workflow for gathering appropriate information (scanning microchips, taking photos of animals, etc.) which will likely not all happen at intake.
- Note: there’s no need to enter animal information when intaking a DA, as that information is already in Shelterly. If changes are needed, first intake the DA then edit the individual animals.
- Refer to ***Shelterly Quick Reference – Editing a Service Request*** for updating animal information.
- To split Animal Groups (animals that have been entered using No. of Animals) use the edit function, as described in ***Shelterly Quick Reference – Editing a Service Request***.
- Exercise caution and don’t act outside your role: don’t cancel animals or otherwise change animal statuses unless authorized and don’t give the public information unless authorized/confirmed.