Shelterly Quick Reference
Creating a Service Request

Summary
The Hotline Operator's role is to create (and edit) new Service Requests (SRs) in Shelterly, using the Hotline menu command.

Select the HOTLINE Module

Select OWNER CALLING, NON-OWNER CALLING, or FIRST RESPONDER CALLING as appropriate.

Lookup Address
Use **Search for Service Request Address** to type address, then select the matching verified address from the pull-down menu.
- Shelterly only accepts verified addresses – you can't type directly into the greyed-out address fields below.
- If the caller doesn't have a street address, enter just a street name such as "First Street" or an intersection such as "Pine Lane & Main Street".
- On the final page of this workflow, you will be able to fine tune the exact location by dragging the location pin on the map. Note that the pin cannot be adjusted on this page.

Use Matching Service Request and **Use Matching Owner**
- One or both options will appear if Shelterly recognizes the address as one where an SR already exists or has previously existed. If they do not appear, select **Next Step**.
    - If both options appear, users can select only one. If the user has selected one but wishes to unselect it, select another option or re-select the chosen option.
- **Use Matching Service Request**
    - If an SR already exists for this address, Shelterly will suggest it.
    - Selecting the existing SR will open the existing SR, allowing the user to edit in any new information.
        - Your organization may have guidelines on when to create a new SR for an address with an existing SR. Such circumstances may include: animals with different owners, animals with significantly different needs, or if the existing SR is older and has already been addressed.
        - Note the status of the suggested SR. Adding an animal to a closed SR will reopen it. Follow your organization's procedures for notification of changes, in particular when adding a new animal to an Assigned SR, whose field team should be made aware of the addition.
        - Use caution not to introduce errors or overwrite existing information in the existing SR.
- **Use Matching Owner**
    - Select if owner is confirmed to be the same.
        - Selecting the matching owner will preload the owner's information. Confirm the information is correct.

- If you want to create a new SR instead of adding to an existing one, select **Use Matching Owner** instead of **Use Matching Service Request**.
- Select **Next Step**
  - Note: returning to this page after selecting **Next Step** will cause any later information to be lost. If an error is made on this page, it's usually better to complete creating the SR then edit to correct the error. Otherwise the user may wish to abandon the incomplete SR and start fresh.

Enter Owner Information, Reporter Information, and/or First Responder Information

- If non-owner or first responder calling:
  - Enter reporter or first responder 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.
- **Owner Information** page
  - If you used **Use Matching** Owner on the previous page, just confirm the preloaded information is correct.
    - If owner address is different, unselect the **Owner Address Same as Service Request** box and enter the owner address.
  - If you are entering a new owner, first type the name in **Use Existing Owner** field.
    - 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.
      - Owner address will autofill with the service request address entered on the first page. If owner address is different, unselect the **Owner Address Same as Service Request** box and enter the owner address.
      - If an existing owner was chosen from the Use Existing Owner pull-down, the **Owner Address Same as Service Request** will automatically unselect and the owner address field will fill with existing owner information.
- Select **Add Another** to add an additional owner.
- Select **Next Step** to continue to **Animal Information**.

Enter Animal Info

Animal Information page

- Select the species from the pull-down. To quickly find the animal species, type it and the pull-down will filter the species against the given information.
- Some species listed, such as **Fowl**, **Lizard**, and **Songbird**, are broad categories. Select if you don't know the specific species or the more specific species isn't listed.
  - Fowl covers landfowl and waterfowl – use for swans and grouse, or any fowl that does not have a more specific species entry.
- If species is not listed and the broad categories aren't appropriate, select **Other** and enter species in **Breed/Description**.

- **Breed/Description:** Use for identifying information, such as "dalmation" or "mustang" or "taller of the two white dogs" or "wearing a leather halter".
- **Animal Notes**: Use for handling information, such as "scared of men" or "offer carrots".
- **Requested Service**: **Reported** is default. Change to **Reported (Evac Requested)** or **Reported (SIP Requested)** if caller states a preference.
- **ACO Required**: Select **Yes** if an animal control officer is needed for an aggressive or unusually challenging animal.
- **Medical Notes**: Use for relevant medical information, such as "needs daily Equioxx, pills are on second shelf in red cabinet by barn door".
- **No. of Animals**: Use for quickly entering a group of animals. Change this number to create a group of animals with the same characteristics, such as 12 chickens. If an unknown quantity, enter as for one animal and describe the group in **Breed/Description** and **Instructions for Field Team**.
- Select **Add Another** to add another animal at the same address.
- Select **Next Step** after all animals have been added to continue to **Service Request Information**.

Note: You can skip this step to create an SR with no animals in it (for example, a service request for dropping off dog and cat food for community use). This is called an "Operation SR".

Enter SR Info
Service Request Information page
- Confirm service request address. Drag the location pin to a specific location if desired, such as when the destination is far from the street address on a large property.
- **Priority**: Adjust as appropriate, which may differ between organizations. Default is **High**.
- **Service Request Followup Date**: Leave as today unless caller requests a later visit.
- **Instructions for Field Team:** Use for tips on finding or accessing the location, such as gate code, key location, directions, or landmarks, or any other relevant information not yet included.
- Select the toggles as appropriate.
  - Select **Verbal Liability Release** if the owner has agreed to the liability statement. Note: this is organization-specific. If your organization has one, it can be seen by hovering over the toggle.
  - Select **Key at Staging** if a needed key is available at staging and the team must collect it before departing.
  - Select **Accessible** if a common passenger vehicle like a Prius can access the location.
  - Select **Turn Around** if a pickup truck towing a trailer can turn around at the location.
- Select **Finish and Create Service Request** to submit the Service Request and go to the **Service Request** page.

On the **Service Request** page, verify the Service Request information is correct.
- To edit the Service Request, refer to ***Shelterly Quick Reference - Editing a Service Request.***

Notes
- It is not necessary to fill out every field when creating an SR, and usually better not to.
- Use the back arrow next to the page name (i.e. **Owner Information**, **Animal Information**, **Service Request Information**) to navigate between pages if needed. Information will be saved unless Shelterly warns otherwise.
- Navigating out of the **HOTLINE** module without clicking Finish and Create Service Request will lead to loss of any entered 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***.
- A useful hack when species is "other": enter the species in parenthesis in the **NAME** field. This makes the species searchable and is visible in a convenient location on the Dispatch Assignment.
    - Examples: "Franklin (lemur)" or "Unknown (coyote)".
- Exercise caution and don't act outside the role of operator: don't cancel SRs or change animal statuses unless authorized and don't give the public information unless authorized/confirmed.