Shelterly Quick Reference
Statuses

Summary

Shelterly associates a status with each Animal, Service Request, and Dispatch Assignment. This document defines each status setting, and explains how those statuses change.

Definitions:

SR	Service Request (contains any number of animals at a single property address) (An SR with no animals is an Operations SR or OSR)
DA	Dispatch Assignment (contains one or more SRs to be worked by a field team)
SIP	Shelter-in-place or Sheltered in Place
UTL	Unable to Locate
NFA	No Further Action

Animal Statuses

Reported

This is an initial status for an animal when a SR is created and no field team has visited the property yet. Use **Reported** when the owner or reporter has not requested a specific service (evacuation or shelter-in-place). The field team will determine which is appropriate.

- Next status (usually assigned during DA resolution or Intake from DA): Sheltered, SIP, UTL, Deceased, Reunited

Reported (Evac Requested)

This is an initial status for an animal when a SR is created and no field team has visited the property yet. Use **Reported (Evac Requested)** when the owner or reporter has requested that the animal be evacuated. The field team will make the ultimate decision on what to do after assessing the situation at the property.

- Next status (usually assigned during DA resolution or Intake from DA): Sheltered, SIP, UTL, Deceased, Reunited

Reported (SIP Requested)

This is an initial status for an animal when a SR is created and no field team has visited the property yet. Use **Reported (SIP Requested)** when the owner or reporter has requested that the animal be sheltered in place. The field team will make the ultimate decision on what to do after assessing the situation at the property.

- Next status (usually assigned during DA resolution or Intake from DA): Sheltered, SIP, UTL, Deceased, Reunited

Sheltered

The animal is in a shelter, at a veterinary hospital, in foster care, or otherwise contained. This status is set during Intake.

● Next status: Reunited, Deceased

Sheltered in Place (SIP)
The animal is being cared for at their property. This status is set during DA resolution.
● Next status: Sheltered, UTL, Reunited, Deceased

Unable to Locate (UTL)
The animal could not be found by the field team that visited the property. The field team typically leaves food and water, and returns multiple times to try to find the animal. After one or more property visits, in consultation with the owner, the status may be changed to NFA. Some animals remain in hiding and remain UTL, but consume food and water.
● Next status: Sheltered, SIP, NFA, Reunited, Deceased

No Further Action (NFA)
The animal remains UTL and it is futile to continue looking. This status can be applied after consultation with the owner.
● Next status: *None*, unless the animal appears

Reunited
The animal has been reunited with their owner. This is also used when the evacuation order is reduced to a warning, and we've confirmed the owner is back home. This status is only set by Dispatch or Debrief/Resolution, or the Shelter when they return the animal to the owner.
● Next status: *None*

Deceased
The animal is confirmed to be deceased.
● Next status: *None*

Canceled
This is only used when the Animal entry was an error. Only Leads should cancel an animal and they should make clear notes about why the animal was canceled. This removes all reference to the animal from the system and cannot be undone.

SR Statuses

Open
The SR requires action and is waiting for assignment to a field team. An SR stays Open until every animal in it is Sheltered, Reunited, NFA, Deceased, or Canceled.
● Next status: Assigned

Assigned
 The SR is currently associated with a Dispatch Assignment for a field team. Dispatch Assignments are typically resolved by the end of each day, which updates the status of each SR in the DA.
● Next status: Closed, Open

Closed

SRs are closed automatically when all the animals in the SR are Sheltered, Reunited, NFA, Deceased, or Canceled.

- Next status: *None*

Canceled

This is only used when the SR entry was an error. Only Leads or the Dispatcher should cancel an SR. They should make clear notes about why the SR was canceled. This removes all reference to the SR from the system and cannot be undone.

DA Statuses

Open

The DA has been created and is ready for (or has been) assigned to a Field Team. It remains open until every SR in the DA is resolved (Actions > Resolve Dispatch Assignment, followed by Save and Close). SRs in the DA that are still in Open status go back in the Dispatch queue for a new Dispatch Assignment.

- Next status: Closed
- **Unable to Complete** This is an option for an SR within a DA. It means the field team was unable to go to the SR address. It puts the entire SR back in the Dispatch queue for reassignment.
- Note: An Open DA that does not have Team Members assigned is considered to be a Preplan, otherwise it is considered Active. The Search DA page allows filtering by Preplanned vs. Active vs. Closed.

Closed

All SRs within the DA have been resolved.

- Next status: Open (can reopen a closed DA to add additional resolution notes)