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

Check Map for Duplicates
- Use the Address Finder on the Hotline map to check for existing SRs.
- If no existing SR exists, proceed to Enter Caller Info below.
- If an SR for that address exists, open it to check if the new information should be added (usually) or a second SR should be created for the address (in some cases when existing SR has been closed, or for different animal needs or owners).

Enter Caller Info
Select **OWNER CALLING**, **NON-OWNER CALLING**, or **FIRST RESPONDER CALLING** as appropriate.
- 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
    - 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.
    - Note: 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".
    - Click and drag the pin on the map to fine-tune location if appropriate.
- Select **Next Step** to continue to **Animal Information**.

Enter Animal Info
Animal Information page
- If species is not listed, select **Other** and enter species in **Breed/Description**.

- **Breed/Description:** Use for identifying information, such as "taller of the two white dogs" or "wearing a leather halter" or "parakeet pair".
- **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 duplicate the EXACT entry on this page, such as to create 12 identical 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
  - If different from owner address, uncheck **Address Same as Owner** and enter service request address in **Search for Service Request Address**.
- **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 four toggles as appropriate
  - Select **Forced Entry Permission** if the owner gives permission for forced entry.
    - Not all organizations perform forced entry, so this may be irrelevant.
  - 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 entering the SR will lead to loss of any entered information.
- If a **Duplicate Service Request Address Found** message appears when submitting the SR, open a new browser tab to view the existing SR, then decide whether to submit or cancel the new SR. Usually it is better to edit the new information into the existing SR than create a duplicate.
- 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 (bobcat)".
- 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.