

Shelter Intake and Pathway Planning

Shelter intake will continue to be the Right Place for some animals. Successful intake occurs at The Right Time and requires good shelter design, properly-trained and sufficient staff, and solid, documented procedures. Appropriate pathway planning should be part of the intake process; it will lead to shorter shelter stays and improved animal health and welfare for every animal, and person, in the shelter.

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Intake procedures and evaluations are a critical control point for animals entering the shelter system – be that physically at the shelter or in the community/foster home. Identifying problems at intake helps:

- Ensure each animal receives care promptly
- Provide information to facilitate Return to Home, adoption, transfer or alternate placement where appropriate to help optimize length of stay (LOS)
- Limit exposure of sick animals to the rest of the population
- Enhance safety and welfare for animals and staff

Information gathered at intake will also help get animals on their proper pathway from the start. Appropriate intake pathway planning will lead to shorter shelter stays and improved animal health and welfare for every animal in the shelter.

Intake capacity planning

Estimating how many animals will arrive on any given day guides planning for sufficient intake staffing giving them the time and tools to do a great job. Comparison of daily or monthly intake to outcomes guides population management. Intake and flow-through plans must address any

substantial disparity between intake and and positive outcome options.

It is critical to calculate the number of animals likely to be admitted each day on a monthly basis in order to account for seasonal variations. The expected average daily intake (Monthly Daily Average, or MDA) can be calculated by dividing the number of animals admitted during a given month by the number of days in the month (see [Calculating Shelter Capacity](#) for more details).

The number of animals anticipated on a monthly basis can be determined based either on policies or scheduled appointments that manage intake or on numbers and trends from previous years. (For example, if a trend of a 33% decrease in intake has been seen in each previous month compared to the year prior, intake planning should assume a 33% decrease in the next month.) Because these estimates are based on average numbers, there may be more or less animals entering on any given day. The use of appointments for non-emergency cases, greatly helps to facilitate daily intake predictions.

Intake Staff

Staff the intake area to meet seasonal and daily variations in intake. Time how long it takes for a trained staff member to perform an intake evaluation with all steps, as described in your protocols. Multiply the number of minutes required to complete each animal intake by the MDA intake to determine staffing needs (e.g. 15 minutes * 10 cats / day = 150 minutes or 2.5 hours).

Whenever possible, plan for a team of two for the safety of both the animals and staff. Seasonal staff may be necessary to assist with the influx of cats during kitten season. When seasonal staff are utilized, pairing a highly trained intake team member with a seasonal assistant may reduce training requirements and improve efficiency.

Intake staff need training in identifying medical and behavioral concerns, infectious disease transmission and control, the importance of accurate data entry and population management. If intake staff also handle other animals already in the shelter, take precautions to minimize disease transmission to, and from, newly arrived animals, such as washing hands well and donning a clean top while performing intake.

Intake area design and layout

Ideally, intake areas should be used exclusively for intake; other areas should be designated for examination of sick animals and for euthanasia.

If this is not possible, the area should never be used for more than one purpose simultaneously, and should be thoroughly disinfected before being used for intake.

The intake room should be fully enclosed to prevent escapes. It should be easy to clean and disinfect, and be located in a quiet area of the shelter. A few housing units may be placed in the intake area but they should be designed such that an animal is only there for a few hours at most. Plan intake evaluations to minimize kennel moves and repeated handling (i.e. from intake, house animals according to their pathway based on the intake evaluation.)

Materials should be readily available to complete an intake exam and disinfect the area for the next animal. Ideally separate intake rooms should serve dogs versus cats and other species. If this is not possible, at minimum create visual barriers and avoid processing dogs and cats at the same time, such that visual exposure of cats to dogs is minimized. Provide elevated shelves or counters to place cat carriers on so they do not have to remain on the floor, and cover carriers at all times. Do not leave dogs tethered in intake areas unattended.

General intake room guidelines and procedures

- Clean and disinfect exam surfaces, holding areas and carriers between animals with a parvocidal product such as Rescue®
- Clean and disinfect the whole area at least daily with a parvocidal product and always after contamination by a sick animal
- House all incoming healthy animals in clean, disinfected housing units away from sick animals

Intake procedure

Individual shelters must assess the needs of their population to determine exact intake steps. Some critical steps include the following:

- Provide every person who brings in an animal with a history profile form. Information provided by an owner or even a person who has found an animal can be very valuable in determining that animal's needs and helping plan the animal's pathway.
- Make your initial assessment before removing the animal from its cage or carrier
- Scan for microchip and look carefully for other identification
- Estimate the age and sex of the animal – training must be given and

tools provided in the intake area to assist with this (e.g. [ASPCA Pro Kitten Aging reference](#), [UF Puppy aging sheet](#), [Animal Sheltering Dog and Cat aging sheet](#), [Animal Sheltering Reference for how to sex cats](#))

- Weigh the animal
- Complete a [brief physical exam](#) including a [Wood's lamp exam](#) and any other initial screening tests as indicated by the needs of your population.
- Include, and note, observations of the animal's behavior during the physical exam and vaccination process. Some shelters have moved to using the animal's intake behavior as their behavior evaluation such that friendly animals without concern are not given a full traditional behavior evaluation; this frees up time to spend with animals who are exhibiting behavioral concerns. Rate every animals' level of fear, anxiety and stress (FAS) to help determine what is needed to help the animal cope while in the shelter (the [Fear Free Shelters program](#) is a valuable resource that is recommended for all shelter personnel).
- Vaccinate with core vaccines (see our [Vaccination in Animal Shelters](#) info sheet for more details)
 - Note date for revaccination in the animal's record, if needed needed (e.g., every two weeks for animals under 20 weeks of age)
 - Reconstitute vaccines on an as-needed basis. Use reconstituted vaccines within 20 minutes of mixing and store in the refrigerator during that time. If vaccines sit longer than 20 minutes, discard and pull up new vaccines.
- De-worm/apply external parasite control--see our [Summary of Ectoparasite Treatments](#).
 - Note date for retreatment for internal or external parasites in the animal's record, if needed.
- Take a photograph that clearly shows the animal's face and any identifying features.
 - The photo should be on the cage card and immediately uploaded to the shelter's website to be viewable by the public looking for their lost pet
- Communicate to medical team and provide appropriate housing for sick and injured animals promptly
- Assign an initial pathway plan including initial housing location
- Accurately enter all information about the animals and observations into the shelter's software system (e.g. Chameleon, PetPoint, ShelterLuv, Shelter Buddy) to allow for efficient communication and animal tracking
 - All staff must be trained on how to input information accurately into the shelter's software system

- Print out a cage card
- In addition to computer records, information can also be recorded on paper records
 - Download our example forms: [Cat Intake Exam Form](#) and [Dog Intake Exam Form](#)

Housing choice and pathway planning

Designate a pathway plan and housing area for the following categories of animals (animals can diverge from their pathway if the need arises but all animals should start down a decided pathway right from intake):

- Puppies and kittens under 6-8 weeks of age (eligible for foster care)
 - Easy to disinfect
 - Used only for short term housing
- Puppies and kittens between 6-8 weeks and 5 months of age (youngsters eligible for adoption)
 - Prioritize [compartmentalized housing units](#) if not all units are compartmentalized to allow for minimal handling during cleaning to reduce risk of fomite transmission of infectious disease
 - Easy to disinfect
- Animals for immediate transfer
- Candidates for immediate adoption and open selection (animals to be on view to the public during their stray hold to expedite adoption selection)
- Sick animals with infectious disease
 - Isolate in a separate room/ward if possible or remove from the population
 - Separate animals for infectious skin disease, GI disease, and respiratory disease
- Non-infectious injured or sick animals
- Dangerous animals or those requiring bite quarantine/rabies observation
- Community cats/cats for return to field
- Stray/lost animals not eligible for open selection
- Other required holding
- Animals to be euthanized

See the webinar on [Fast Tracking to Save Lives](#) to learn more about how these practices have worked for shelters and read the information sheet on [Facility Design and Shelter Housing](#) to learn more about housing.

[Daily rounds](#) are critical to ensure that animals are on and moving along their correct pathway.

Intake Area Supply List

It is imperative for intake rooms to be fully stocked with all necessary equipment and tools to allow intake to be safe and efficient for both the animals and staff. Having to leave the intake room is frustrating for staff as it interrupts the flow of this incredibly important process.

- Non-porous easily cleaned, stable exam surface
- Computer and a printer (for cage cards and other documentation)
- Clean scrub or uniform top for staff who has worked with other animals in the shelter
- Disposable gloves
- Universal microchip scanner
- Scale – floor type for dogs and table top type for cats and really small dogs/puppies
- Digital camera
- Picture station
- Refrigerator for vaccines and diagnostic tests only (e.g. parvo SNAP tests)
- Vaccines
- Syringes and needles
- Adverse vaccine reaction response kit including protocols and instructions
- Intake treatments (e.g. de-worming, external parasite control)
- Parvocidal disinfectant product (e.g. Rescue®)
- Soap/water or at least 60% alcohol disinfectant for hands
- Paper towels or one use 'raglets'
- Towels or cut up sheets to cover cat carriers
- Thermometer and disposable covers
- Clippers
- Easy cheese and other tasty treats
- Safety restraint equipment
 - Muzzles
 - Leashes
 - Nets
- Telephone, call button
- Flea comb
- Cotton tipped swabs
- Woods lamp
- Penlight
- Stethoscope
- Diagnostic sample collection supplies (if staff is trained on how to use)
 - Skin scrape spatula, syringes, swabs
 - Fecal float

- Blood collection tubes
- Ear cleaner
- Nail clippers

To learn more about intake please see Drs. Newbury and Balanoff's 2015 HSUS Expo presentation on [The Shelter Handshake – Mastering the Art of Intake](#) (3.5MB PDF, opens in a new window).