

Shelterluv: Data Entry and Hints

last revised 9/29/2019

1. Breed Selection, Primary/Secondary

- If the dog is a pure bred then only fill in the “Primary Breed” with the breed
- If it’s a mixed breed then “Primary Breed” should be filled in with your best guess as to the main breed and “Secondary Breed” should be the next best guess or what it might be mixed with
- If you have absolutely no idea what the dog is then “Primary Breed” should be filled in with “Mixed Breed - (with size)” and Secondary Breed should not be filled in at all
- If you have a guess as to what the “Primary Breed” is but no idea of secondary then put that breed in “Primary Breed” and “Mixed Breed - (with size)” into the second field.

If a dog is NOT a pure breed, you **must** choose either Mixed breed (with appropriate size) or a secondary breed otherwise the dog shows up as a pure breed.

examples:

1) Sneakers who I think is part min pin and part italian greyhound and who knows what else should have Primary Breed be min pin and Secondary breed be Italian Greyhound. We noticed that Sneakers is currently marked as primary breed min pin but blank for Secondary Breed - that is wrong in our current system because it makes him look like a purebred min pin. But that’s ok we just need to be consistent from here on out.

2) Zorro Pin who is a purebred min pin as far as we know would have Primary Breed be min pin and Secondary be blank.

2. Be careful to NOT enter any extra spaces at the beginning of or in an entry. That can make it difficult to search for. It is just like misspelling something.
3. Only enter the information in a field that correspondence with what that field is for. Entering other information is a “hack.” We want to avoid any hacks. If you want to enter information, but don’t know where it should go, please ask your supervisor for help.
4. Any name that is in Shelterluv should also be in LGL. When creating a person in Shelterluv, be sure to enter the LGLid into the “Previous Shelter Id” field. We do not need to track human contact info in Shelterluv. Choose “Refused” for email, address, and phone number when entering adopters and fosters. Any changes to a name in

LGL must also be made in Shelterluv for adopters, fosters, surrendering guardians and partners.

5. For Check ins - the person who is currently the legal owner or representative for the legal owner should be the person whose contact info goes into LGL, and whose name goes into Shelterluv, NOT the deceased person or the person who is now in the nursing home, etc.
6. Dog Bio should be put in a memo type Kennel Card/Website Memo. Then this bio (if dog publishable) and photos (if publishable) get automatically uploaded to Petfinder/Adopt-a-Pet/etc. If a dog is returned then you can find the dog bio in a memo called "Dog Bio from iShelter" and then you can copy and paste that into a new memo of type "Kennel Card/Website memo" to start with. Also, there is now a memo type called Bio Notes. This is where Bryan will store the bio question answers and bios and info that fosters send to him to create bios. Bio Notes is also where you should put the reason for us not wanting a dog to be published to rescue groups.

The only thing that determines whether a dog goes to rescue groups is if they are given a status of where Publish is Yes. That means if a dog is of any status that is publishable AND there Kennel Card/Website bio is blank, it will publish that dog with no bio.

Bryan is the gatekeeper of who goes on Rescue Groups, so when Angela inputs a new dog into SL that does not have a bio written or good photos, she is just going to mark it as "no rescue groups" status and Bryan knows to go update that info with new photos and a better bio when they are ready.

7. Trial adoptions (our version of a dog being adopted but we don't want to finalize it yet til we make sure it sticks):

if the dog is being adopted by a non foster home: move the dog into the potential adopter home, location should be "In Shelter" "With Prospective Adopter", status Pending Adoption (from shelter), then create a pop up memo that states "Pending adoption with so and so 9/11/2019" Also make a pop up memo for the people that are pending adoption i.e. "Adoption Pending with Jack White 1688 as of 9/12/19"

if the dog is in a "foster-to-adopt" home: go to the animal, change the current status to a In Foster-to-Adopt - I don't think we need a memo but you can decide. Just to clarify we wouldn't do this process when a foster home decides to adopt a dog, in that case when that happens we just finalize the adoption. This is for those cases where a foster home takes a dog home hoping to adopt but we don't want to quite finalize yet.

if a dog is in a foster home and an adopter is committed but can't pick up the dog quite yet: the dog should be left with the foster home until the actual adoption and a pop-up memo should be added to the dog "Pending Adoption with Nicole Records, will move 9/28"

8. To actually complete an adoption, since we are processing payment outside of Shelterluv, pretend that they are paying with cash and choose "Pay with Cash or Check." Click through til you get to the Checkout options where you select complete Paper. On the final checkout screen click on Choose Payment Options and select "Cash" and enter the adoption fee.
9. The "distinctive features" in iShelter should be handled as a "Pop up memo" in Shelterluv
10. There is no "aliases field" in Shelterluv. The "aliases" that we would enter in iShelter should be added to the dog's name in Shelterluv. So the name would be "Ruthie B aka Ginny"
11. Behavior evals and any follow up behavior info should go into the "History memo" (the same memo, do not create a memo for each entry). Do not use the behavior tab for behavior info..
12. Any memo with the words "iShelter" in it is not to be edited or deleted ever. Those are for historical purposes only and should stay as is. If one of the existing memo types does not fit with the information you want to add, then let Monica know and she will add another memo type.
13. The "History" Memo is what should be used for info that we used to store in Hidden Comments in iShelter i.e. all of our dated chronological notes including, notes from the shelter, medical info, info from fosters,
14. We are not using the "behavioral" tab for anything at this point. And the only thing the staff uses the medical tab for at this point is to record a medical outcome that is a death.
15. Use a Popup Memo for concise info that used to be put in Distinguished Features in iShelter. This "Pop-up" memo needs to be short. For more explanation, you should put additional information in a memo type called "Pop-up Explanation"
16. If there are people in SL with the same name but they are in deed two separate people, the way we will handle this is to put their LGL id after their last name. You'll then have to go to LGL to see which person is the right one for your use.

17. Make sure that there is only one name per record even if a couple is fostering or adopting. Just choose one of the people as the fosterer or adopter.
18. The size of the photos in iShelter and Shelterluv are different. Shelterluv wants 1024x1024. You do not need to crop it in Photos. Basically export a large version of a photo (bigger than 1024x1024 if we have it bigger) from Photos onto your Desktop (or wherever the photo is) and then upload to Shelterluv with the media manager. Make sure square is nicely centered on the part of the dog you want, click add and Shelterluv will resize it to 1024.

Sometimes all we have is a small bad photo given by the person turning in the dog. There is nothing we can do about that and that's ok to upload that to Shelterluv but do not mark it to be published. Only mark photos for publishing that are big enough and that we want to upload to rescue groups.

19. ALL the movement history is not in the Dog->History->Caretaker tab from dogs exported from iShelter. It will be from time of import and into the future though. The actual movement history for dogs imported from iShelter is in a memo called "Movements from iShelter" so we didn't lose the data.
20. For future reference, the first dog entered in Shelterluv after the import was id# 1903 and we had to skip 17 physical id tags (to account for the ids that we couldn't recover from the practice dogs we created in Shelterluv before the real import)
21. To record a dog as "died in our care" notify the Executive Director, if she isn't around let Monica know. Only they have permission to mark a dog deceased.
22. One photo of each dog should be uploaded ASAP. If a dog dies before any photo is taken or received, we will upload a rainbow bridge graphic. (but I think we can wait until this happens before worrying too much what that graphic is going to be because I think it may never happen.)
23. Person Unknown - after the import from iShelter, there are three reasons for Person Unknown to show up in the History->Caretakers:
 - we don't actually know who has/had the dog ex. person who found a stray
 - the name wasn't recorded in iShelter in the standard way but if you read the dog's history the name might be mentioned - in some cases this could be fixed but we think it's not necessary because you can find the info in the memos.
 - there was a bug in the imported data where dogs returned to the original owner had person unknown as the owner. We transferred all these dogs to the appropriate owner.
24. When the original owner is going to continue caring for the dog, set the Location to "Shelter->With Previous Owner" and then create a Pop-up memo that includes previous owner's name.

25. **Naming attachments in Shelterluv:** the name you give the file on your computer is the EXACT name that will show up when attached to SL. You can't edit once something is uploaded to SL (you could change it by deleting the uploaded file and uploading it again with the correct name)

We don't need to put our clinic. Only include location name if it is NOT from our clinic.

Basic Outline:

Name of the dog- What The Doc Is - Clinic/Shelter where it was done if applicable - most relevant date (abbreviate when possible):

Examples:

Lula Intake TAF 9-9-19

Lula Recheck Form 2-11-20

Lula Rabies Cert -Cottage exp. 9-8-20

Lula Kennel Card - SAS 9-8-19

Zissou Intake Q 9-8-19

Zissou OAC 9-8-9

Zissou Adoption Contract 9-8-19

Cousteau Patient Chart - Cottage 9-8-19

Cousteau Shelter Records - SAS 9-8-19

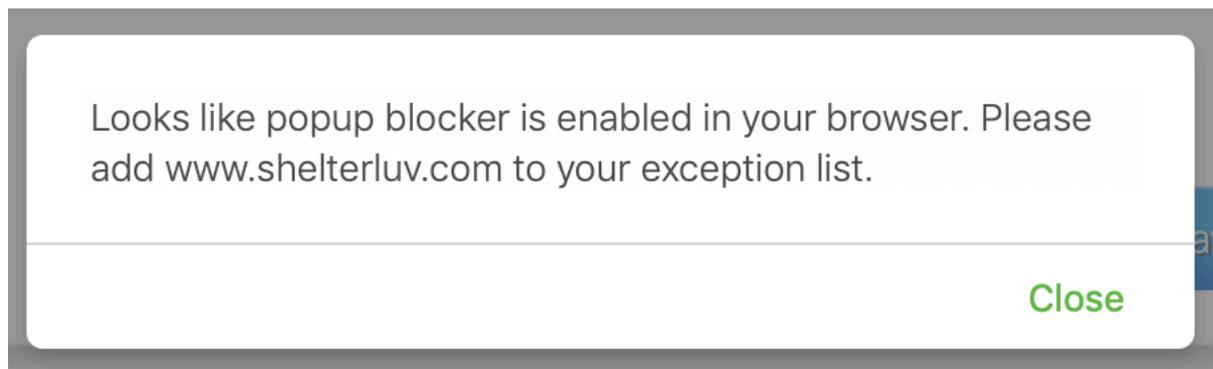
Cousteau Completed TAF - Steinbeck 9-8-19

Lula Xrays 2-1-20

Helpful Hints

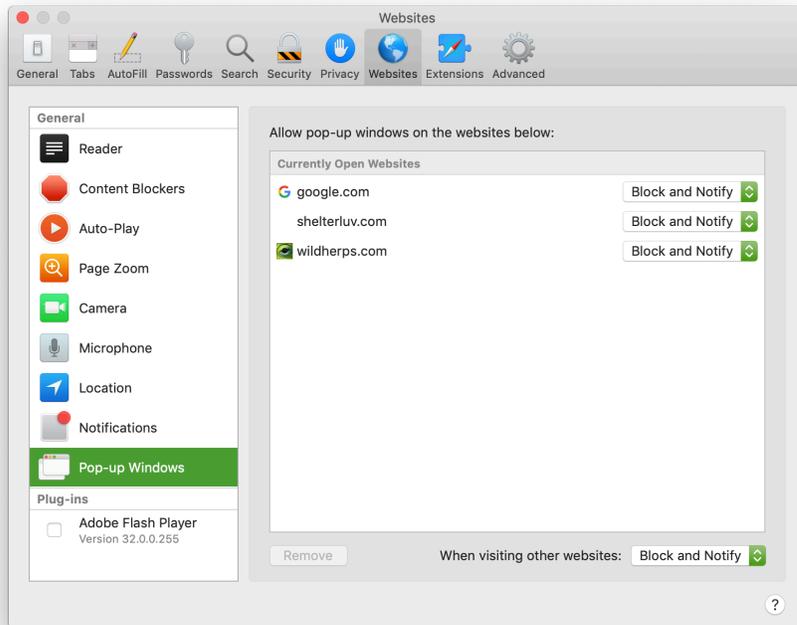
1. Click on the Shelterluv Tab in the upper left hand corner to get back to the main/home page.
2. The "+" symbol leads you to all the activities you might want to do like intaking a dog, adopting out, etc. It provides help along the way. Know that you don't have to use this once you are acquainted with the system and know the steps you need to follow.
3. Always think of the person first. Adopter, Foster, Surrendering Guardian or Partner information needs to be in Shelterluv before you can process an adoption, intake a dog, or put a dog in foster care. Everything starts from the person or partners record.
4. Shelterluv has the concept of "shelter" and "foster home" so if dog is not in a foster home it is in the shelter which for us means at the Boand vet clinic, another vet, etc.

5. You must ALWAYS search for the name of a person before you can add them to Shelterluv. Shelterluv will show you similar names to check for duplicates.
6. Your computer may “autofill” some of the answers, but they’ll most likely be incorrect. Be Aware of the autofill and delete it. Pay attention and you’ll notice a slight difference between what autofill looks like from your computer and what a drop down menu with options from Shelterluv looks like. The box will have a yellow outline around it if you didn’t correctly enter someone.
7. Foster volunteers must be marked “willing to foster” before you can assign a foster dog to them.
8. There are plenty of functions that Shelterluv has that we are not going to take advantage of in the beginning - we will explore these later:
 - use foster attributes like has “cat”, “works all day” etc.
 - upload dogs directly onto our website
 - consider using dog attributes in Shelterluv for classification stuff that is currently done in POMDR db (e.g. “is chihuahua”, “special needs”)
 - process application and fees through Shelterluv
 - Kennel card builder
 - and there’s more!
9. When trying to run a custom report in Shelterluv (and possibly at other times that we haven't yet discovered), you might see something like this on the web page:

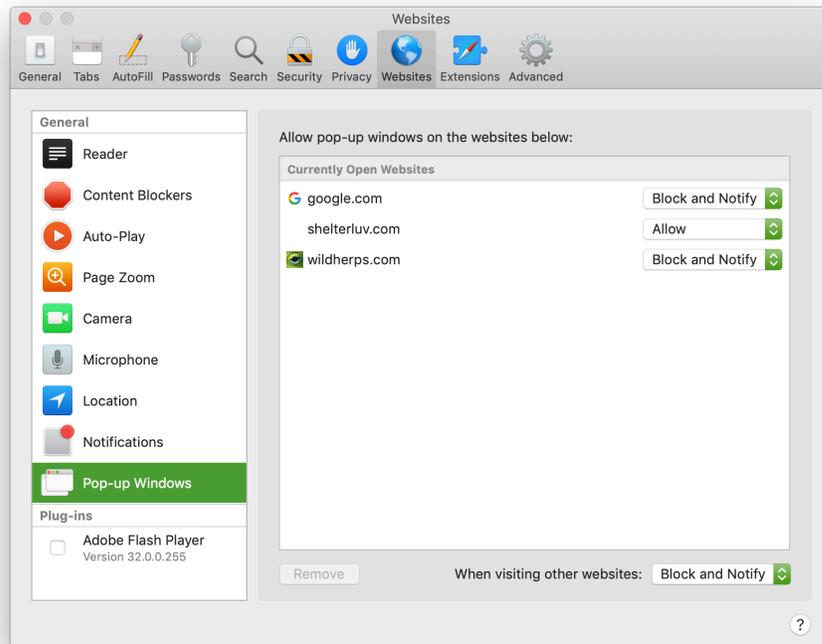


Here's how to fix that in Safari on a Mac:

1. Choose **Preferences...** from the **Safari** menu
2. Click **Websites** in the row of icons on the top.
3. Click **Pop-up Windows** in the list on the left. Your Preferences window should now look something like this:



4. Change "Block and Notify" to "Allow" on the line for shelterluv.com. Your Preferences window should now look something like this:



Now you can do whatever you tried to do in Shelterluv that caused it to complain.