

POMDR Shelterluv Instructions

Last updated 10/4/24

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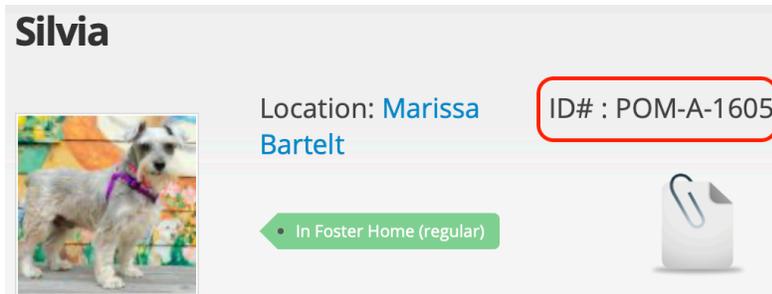
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Understanding Shelterluv IDs and Previous Shelter IDs

Shelterluv automatically assigns an ID to every dog. These are of the form: POM-A-<number>. For example, “POM-A-1234”. “POM” is short for Peace of Mind; “A” is short for “Animal”. Whenever a new animal is recorded in Shelterluv, the number part of the ID is increased by 1. The ID appears on the top-right of the dog’s profile page:



We typically refer to only the numeric part of the dog’s Shelterluv ID, so we would typically say Silvia’s ID is 1605. This ID is used to uniquely identify the dog throughout Shelterluv.

Shelterluv also supports a second type of ID, called the **Previous Shelter ID**. For dogs that were in POMDR’s care before POMDR started using Shelterluv, the Previous Shelter ID is a six-digit number that has some leading zeroes, e.g. “001234”. These numbers come from a system called iShelter that POMDR used before it started using Shelterluv.

For a while this was POMDR’s only use of Previous Shelter ID. But now (starting with dog #2384), all new dogs have a Previous Shelter ID as well as a Shelterluv ID. For simplicity’s sake, we wanted to only have one ID number, but in practice that didn’t work well.

So all dogs have a Shelterluv ID, but not all dogs have a Previous Shelter ID. When a dog has both kinds of ID, the Previous Shelter ID is the number that appears on the dog’s collar tag. Both of these numbers are shown in search results and other such lists:

Added	Picture	Name	ID	Color	Species	Breed	Status	Location	By
07/31/2019		Bella Boxer	POM-A-1851 [001854]	Brindle	Dog	Boxer	In Foster Home (regular)	Foster Care: [Show]	pom_importer

For dogs that do have both IDs, you have to be careful to use the right one for the right purpose. For example, dogs that have both IDs and are still in foster care will have the older Previous Shelter ID number on their POMDR collar tags. The section below called “**How to find a dog’s record by ID or other info**” explains how to look a dog up from either of its ID numbers.

When you’re looking at a dog’s profile page, the Previous Shelter ID is shown in the left column, near the bottom:

Bella Boxer



Location: [Gazala Sandhu](#)

- In Foster Home (regular)
- Altered Has Shots

Cardiac recheck in one year March 2021 x # : POM-A-1851

Anaesthetic considerations: avoid arrhythmogenic anaesthetic agents such as ketamine and atropine. Avoid dexdomitor. Monitor ECG during the procedure closely for potential ventricular arrhythmias x

Profile

Processing

Behavioral

Medical

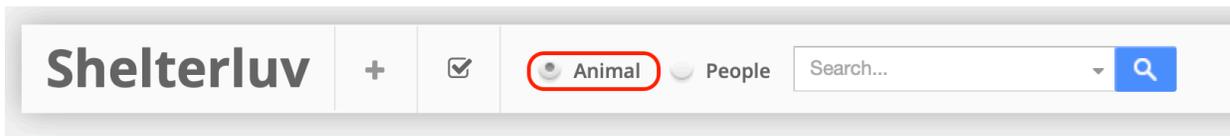
Memos

Species: Dog	Adoption Price Group: Dog fee 2 (\$205.00)
Breed: Boxer/Mixed Breed (Large)	Color: Brindle
Pattern: None	Distinguishing Marks: Primary color:Brindle
Sex: Female	Size Group: Large (60-99)
Altered Pre-Intake: Yes	Altered in Care: No
Age Group: Senior Dog (7+years)	Est. Birthdate: 07/30/2009
Age: 10Y/8M/11D	Adoption Category:
Behavior Category:	Medical Category:
Volunteer Category:	Microchip Implant Date: N/A
Microchip Number : 4A680C6874	Microchip Issuer : Home Again
[Add Microchip]	Intake Subtype: Owner moved to facility that can't have animals
Intake Type: Owner/Guardian Surrender	Intake Date: 07/31/2019
Intake Date: 07/31/2019	Condition at Intake:
License Number:	Issued on:
Expires:	Rabies tag number:
[Add License]	[Add Rabies tag number]
Previous Shelter ID: 001854	Previous ID Issuing Shelter: Peace of Mind Dog Rescue
Previous Shelter ID Type: Petpoint	

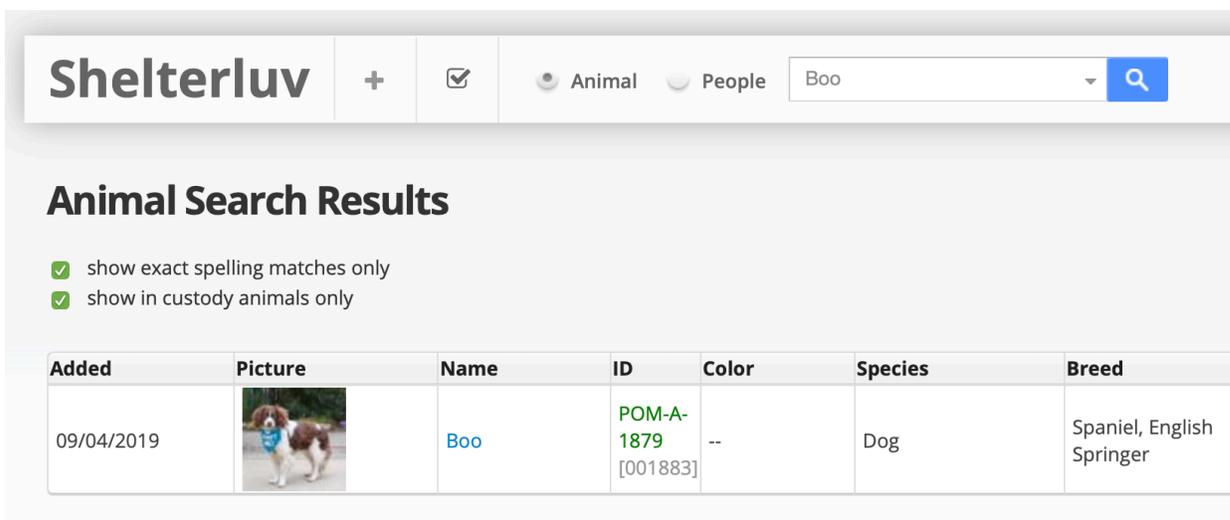
How to find a dog's record

Most often you will look up a dog by name. But if you are trying to look up a dog by other info, go to the section of this document called “**How to find a dog's record by ID or other info**”. If you do know the name, follow these steps.

1. Visit <https://www.shelterluv.com> and log in to your Shelterluv account (if you're not already logged in).
2. At the top of the page, make sure the **Animal** radio button is selected (has a dark dot in it):



3. Type the dog's name in the Search field and hit Return (or click the magnifying glass). In the simplest case, if you spell a dog's name exactly right, and that dog is currently being fostered or otherwise in POMDR's custody, the dog will show up as the only result of the search:

A screenshot of the Shelterluv website showing search results. The header is the same as in the previous image, but the search input field now contains the name 'Boo'. Below the header, the page title is 'Animal Search Results'. There are two checked checkboxes: 'show exact spelling matches only' and 'show in custody animals only'. Below these are search results in a table format.

Added	Picture	Name	ID	Color	Species	Breed
09/04/2019		Boo	POM-A-1879 [001883]	--	Dog	Spaniel, English Springer

4. But sometimes you might spell a current dog's name wrong, and the search will fail. For example, you might type "Carly" because you didn't know that her name is spelled "Karly". In that case, a screen like this will appear:

The screenshot shows the Shelterluv search interface. At the top, there is a navigation bar with the Shelterluv logo, a plus sign, a checkmark, and radio buttons for 'Animal' (selected) and 'People'. A search bar contains the text 'Carly' and a search icon. Below the navigation bar, the heading 'Animal Search Results' is displayed. There are two checked checkboxes: 'show exact spelling matches only' and 'show in custody animals only'. A message reads: 'Rats! We couldn't find any animals using "Carly".' Below this, there are two suggestions: 'Did you mean to search for a person? If so, change the radio button by the search bar.' and 'Or did you mean to search by animal number? If so, remember to add "#" in front of the number.'

5. You probably won't realize that you spelled her name wrong, but if your search fails, the first thing to try is to uncheck "show exact spelling matches only". This will re-do the search (more slowly), looking for dog's whose name is "close enough" to what you typed. In this case (as of today), you would get results like this:

The screenshot shows the Shelterluv search interface with the same search bar containing 'Carly'. The 'show exact spelling matches only' checkbox is now unchecked, and 'show in custody animals only' remains checked. The search results are displayed in a table with the following data:

Added	Picture	Name	ID	Color	Species	Breed
08/23/2019		Karly	POM-A-1871 [001876]	--	Dog	Chihuahua
05/24/2018		Carlos	POM-A-1544 [001547]	--	Dog	Chihuahua

- Another reason that your first search might fail is that the dog you're searching for is not currently in POMDR's custody. A common case is when you want to search for a dog that has been adopted. The initial search will fail in this case. For example, if you search for "Zorro" you'll initially get no results:

The screenshot shows the Shelterluv search interface. At the top, the logo 'Shelterluv' is followed by a plus sign, a checkmark icon, and radio buttons for 'Animal' (selected) and 'People'. A search bar contains the text 'Zorro' and a magnifying glass icon. Below the search bar, the heading 'Animal Search Results' is displayed. Two checkboxes are checked: 'show exact spelling matches only' and 'show in custody animals only'. A message reads: 'Rats! We couldn't find any animals using "Zorro".' Below this, two suggestions are provided: 'Did you mean to search for a person? If so, change the radio button by the search bar.' and 'Or did you mean to search by animal number? If so, remember to add "#" in front of the number.'

- If you uncheck "show in custody animals only" the system will search again (more slowly) through all of the dogs that were ever in POMDR's custody. Note that many of the dogs that were adopted before POMDR started using Shelterluv will not have a photo:

The screenshot shows the Shelterluv search interface with the same search criteria as the previous image. However, the 'show in custody animals only' checkbox is now unchecked. The search results table below shows one result for a dog named 'Zorro'.

Added	Picture	Name	ID	Color	Species	Breed
12/20/2010		Zorro	POM-A-131 [000108]	--	Dog	Collie, Border

8. Now you have found a dog named Zorro, but you realize that this isn't the Zorro you were looking for! This dog is a Border Collie, and you wanted to look up info about the Miniature Pinscher named Zorro. Just like with "Carly", when you don't find the dog you were looking for, you should try unchecking "show exact spelling matches only". In this case, the system will now look through all dogs that were ever in POMDR's custody, and won't require an exact name match either:

Shelterluv

+

Animal

People

Zorro

Q

Animal Search Results

show exact spelling matches only

show in custody animals only

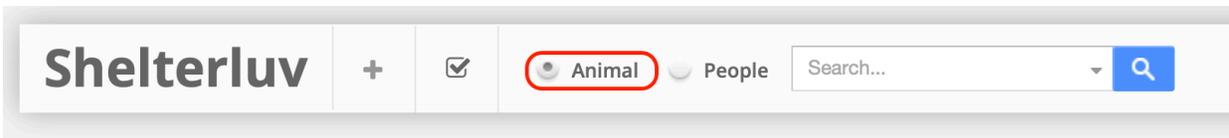
Added	Picture	Name	ID	Color	Species	Breed
12/20/2010		Zorro	POM-A-131 [000108]	--	Dog	Collie, Border
08/17/2018		Zorro Pin	POM-A-1610 [001612]	--	Dog	Pinscher, Miniature
09/01/2017		Arroyo	POM-A-1358 [001361]	--	Dog	Pinscher, Doberman
12/14/2011		Zorro Shepherd	POM-A-279 [000262]	--	Dog	Shepherd, German

So many Zorros! Many POMDR dogs have longer official names than the one you most often hear. Others have been called two different names so their official POMDR name includes both, such as "Walt aka Blue". In any of these cases the fast initial search won't find the dog, so you have to uncheck the "show exact spelling matches only" checkbox to find the dog.

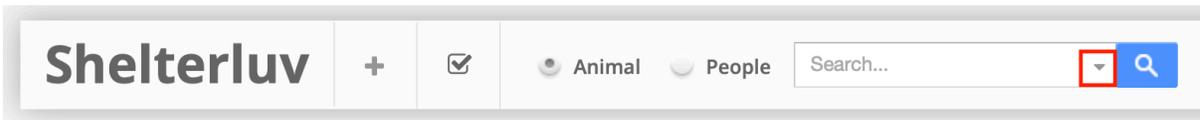
How to find a dog's record by ID or other info

These steps are for when you are trying to find a dog's record but you don't know the dog's name. If you know the name, use the section of this document called "**How to find a dog's record**".

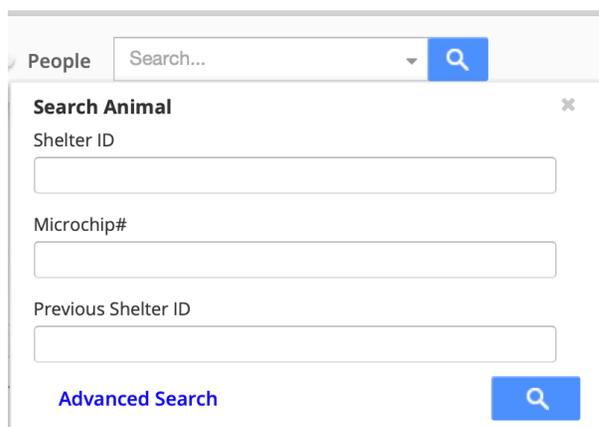
1. Visit <https://www.shelterluv.com> and log in to your Shelterluv account (if you're not already logged in).
2. At the top of the page, make sure the **Animal** radio button is selected (has a dark dot in it):



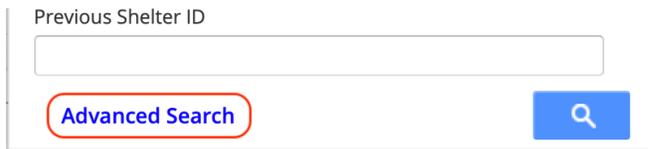
3. Click in the little bitty arrow just to the left of the magnifying glass button:



4. This brings up a pop-up window with the choices to search for a dog by its **Shelter ID** (Shelterluv ID), **Microchip#**, or **Previous Shelter ID**. If you know the Shelterluv ID, enter it here in the Shelter ID field. Or if you know the microchip number, enter it here.

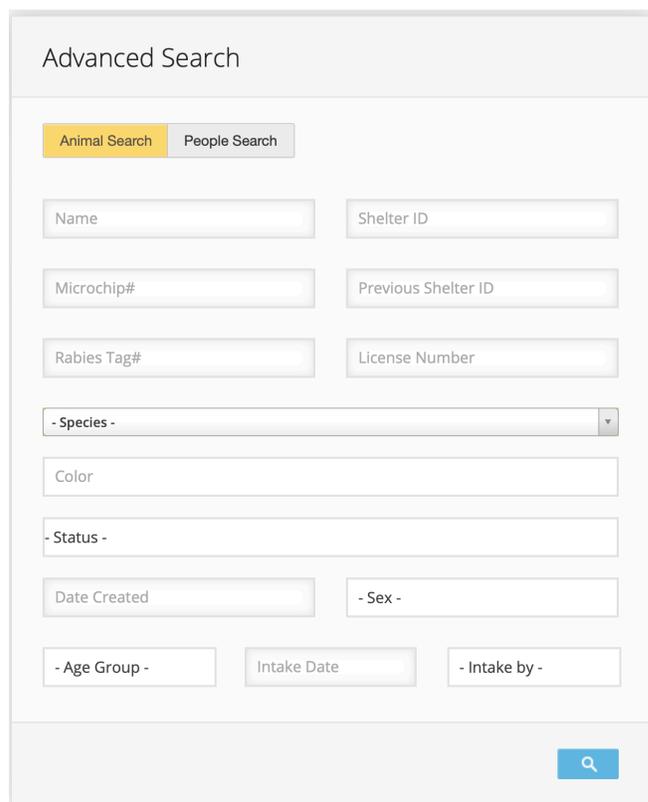
A screenshot of a pop-up window titled 'Search Animal'. The window has a close button (an 'x' icon) in the top right corner. It contains three input fields: 'Shelter ID', 'Microchip#', and 'Previous Shelter ID'. Below these fields is a blue button with a magnifying glass icon and the text 'Advanced Search'.

5. Dogs that came into POMDR's care after the time when POMDR started using Shelterluv (some time in 2019) but before dog #2384 have a Shelterluv ID but do not have a Previous Shelter ID. But dogs before that, and dogs after that, have both. See the section called **“Understanding Shelterluv IDs and Previous Shelter IDs”** for details. You can search for a dog by its Previous Shelter ID (the number that appears on the dog's collar tag) here if you know that but don't know the Shelterluv ID. Note that if the number starts with 0's you must include them when filling out the **Previous Shelter ID** field or Shelterluv won't find the dog.
6. If you still haven't found the dog, because you don't have the name, Shelterluv ID, microchip number, or Previous Shelter ID, click on **Advanced Search** to get even more options:



A screenshot of a search interface. At the top, it says "Previous Shelter ID". Below this is a text input field. To the left of the input field is a red-outlined button labeled "Advanced Search". To the right of the input field is a blue button with a magnifying glass icon.

7. From this **Advanced Search** form you can search by various additional criteria including color, status, sex, age group, etc.



A screenshot of the "Advanced Search" form. At the top, it says "Advanced Search". Below this are two tabs: "Animal Search" (highlighted in yellow) and "People Search". The form contains several search criteria: "Name", "Shelter ID", "Microchip#", "Previous Shelter ID", "Rabies Tag#", "License Number", "- Species -" (dropdown menu), "Color", "- Status -" (dropdown menu), "Date Created", "- Sex -" (dropdown menu), "- Age Group -" (dropdown menu), "Intake Date", and "- Intake by -" (dropdown menu). At the bottom right of the form is a blue button with a magnifying glass icon.

How to look up info about a dog

The first step in looking up info about a dog in Shelterluv is to find the dog's record. The most straightforward way to do this is to search for the dog by name, as explained in "How to find a dog's record". We will start here where we left off, with Zorro Pin. Search until you find his record, then click on his name:

Shelterluv + Animal People

Animal Search Results

show exact spelling matches only
 show in custody animals only

Added	Picture	Name	ID	Color	Species	Breed
12/20/2010		Zorro	POM-A-131 [000108]	--	Dog	Collie, Border
08/17/2018		Zorro Pin	POM-A-1610 [001612]	--	Dog	Pinscher, Miniature
09/01/2017		Arroyo	POM-A-1358 [001361]	--	Dog	Pinscher, Doberman
12/14/2011		Zorro Shepherd	POM-A-279 [000262]	--	Dog	Shepherd, German

Basic information about the dog is shown on the Profile screen that is initially displayed:

Zorro Pin

Adopted ID# : POM-A-1610

 • Healthy In Home 

Profile Processing Behavioral Medical Memos History Edit Record

Species: Dog	Adoption Price Group:
Breed: Pinscher, Miniature	Color:
Pattern:	Distinguishing Marks: Primary color:Black Secondary color:Tan
Sex: Male	Size Group:
Altered Pre-intake: Yes	Altered in Care: No
Age Group: Senior Dog (7+years)	Est. Birthdate: 08/17/2011
Age: 8Y/1M/1D	Adoption Category:
Behavior Category:	Medical Category:
Volunteer Category:	
Microchip Number : 900085000724529	Microchip Implant Date : N/A
Microchip Issuer : Other	
[Add Microchip]	
Outcome Type: Adoption	Outcome Subtype: N/A
License Number:	Issued on:
Expires:	
[Add License]	
Rabies tag number:	
[Add Rabies tag number]	
Previous Shelter ID: 001612	Previous ID Issuing Shelter: Peace of Mind Dog Rescue
Previous Shelter ID Type: Petpoint	
[Add ID]	

Sometimes important information is shown in colored “pop-up memos” that look like little colored sticky notes near the top of the page:

Roxi

Location: [Sandy Ettinger](#) # : POM-A-2016

 • In Foster Home (regular) • Has Shots Will need eye meds for the rest of her life -- Dr Tessa 

Sometimes there is enough information in pop-up memos that part of the page can be obscured. If this gets in your way, you can click the little gray X in the upper right corner of the pop-up memo to make it go away. It will reappear the next time this page is visited, so you haven't made a permanent change.

Bella Boxer



Location: [Gazala Sandh](#)

- In Foster Home (regular)
- Altered
- Has Shots

Cardiac recheck in one year March 2021

Anaesthetic considerations: avoid arrhythmogenic anaesthetic agents such as ketamine and atropine. Avoid dexdomitor. Monitor ECG during the procedure closely for potential ventricular arrhythmias

Profile

Processing

Behavioral

Medical

M

Species: **Dog**

Breed: **Boxer/Mixed Breed (Large)**

Pattern: **None**

Sex: **Female**

Altered Pre-Intake: **Yes**

Color: **Brindle**

Distinguishing Marks: **Primary color:Brindle**

Size Group: **Large (60-99)**

Altered in Care: **No**

More information is stored under the various tabs. For dogs that left POMDR's custody before we switched to Shelterluv, almost all of the information is stored in the tab called Memos:



Dogs that were in POMDR’s custody when the switch to Shelterluv occurred or later should have a memo of type “History” that includes accounts of communications between POMDR and vets, foster parents, prospective adopters, etc:

09/11/2019	History	<div style="border: 1px solid #ccc; padding: 5px;"> <p>1.11.19 Behavior eval: This dog is a sweet sweet sweet baby. He has suffered - the vet thinks he may have been burned. He gives kisses, loves attention, and LOVES food. He trots around from person to person and is a doll. We can learn from him about dealing with life. He belongs with us He is a hero. He was shut down for about 4 days, then started trusting people and here he is. Made</p> </div>
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Dogs that were adopted before the switch to Shelterluv might not have a memo of type “History”. If not, look for a memo of type “Dog History from iShelter”. This has the same kind of information, but has no changes more recent than when we started using Shelterluv. Note that this memo should never be edited by anyone; it is meant to include only the exact text that came from iShelter.

09/10/2019	Dog History from iShelter	<div style="border: 1px solid #ccc; padding: 5px;"> <p>8.17.18 transfer from Kate's rescue-AP beh eval passed per Monica-AP 8.17.18 from Monica: '7yrs old neutered by original guardian microchipped but not activated Rabies 8/15/18 has flea treatment (bravecto on 7/10/18) and dewormed on 7/10/18, 8/2/18</p> </div>
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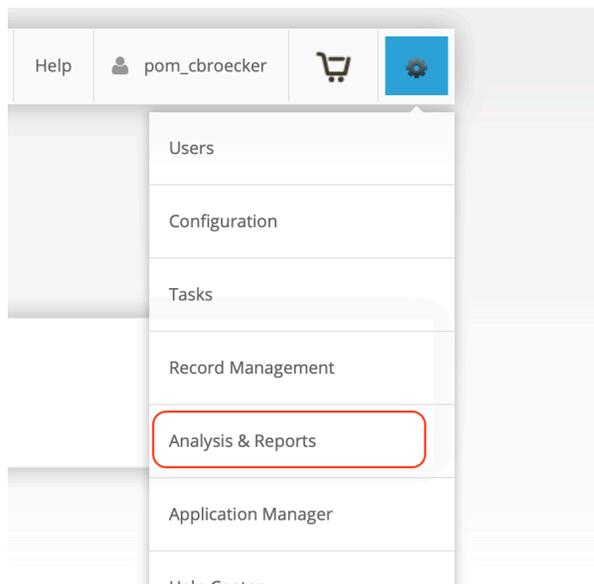
Many memos have too much text to fit in the displayed box. To see more of the text, drag down on the resize indicator in the lower right corner. This will make the box bigger. For very long memos you might need to make the box bigger, then scroll the page up, then make the box even bigger, etc. Note that this trick might not work in all web browsers, but it does work in Safari and Chrome at least.

09/10/2019	Dog History from iShelter	<div style="border: 1px solid #ccc; padding: 5px;"> <p>8.17.18 transfer from Kate's rescue-AP beh eval passed per Monica-AP 8.17.18 from Monica: '7yrs old neutered by original guardian microchipped but not activated Rabies 8/15/18 has flea treatment (bravecto on 7/19/18) and dewormed on 7/19/18, 8/2/18 dhpp 7/19/18 let me know if you need any other info.'-AP 8.17.18 from Monica: 'Yes Ill scan and send you rabies certificate soon. Id say transfer from rescue and they couldnt pay for all he needed (which I think is only dental with blood/urine test). He was originally transferred from guardian surrender and lived most of the time in crate which explains him needing some socialization.'-AP 8.17.18 form MONica: 'His appt is on 8/31 at 11:30am (she said she could get him in sooner if we</p> </div>
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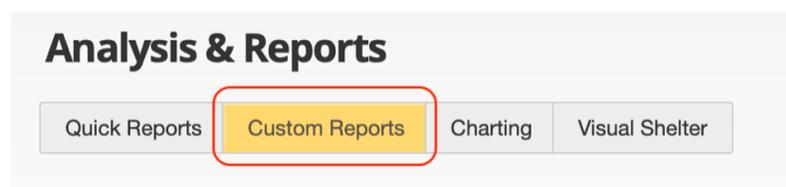
How to get a list of dogs missing microchips

In order to make sure all microchip info has been entered into Shelterluv, it's good to regularly create a list that shows all the dogs that are missing microchip info. This section explains how to do that.

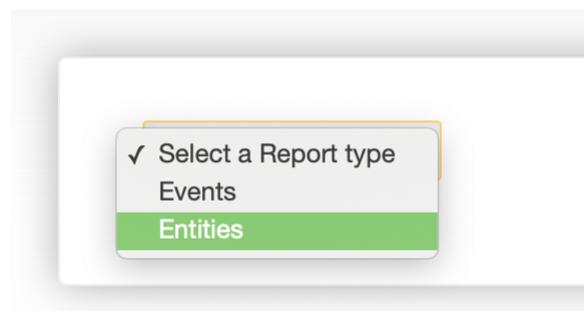
1. Move the mouse to the gear icon near the top-right corner of the screen, then choose **Analysis & Reports** from the menu that appears.



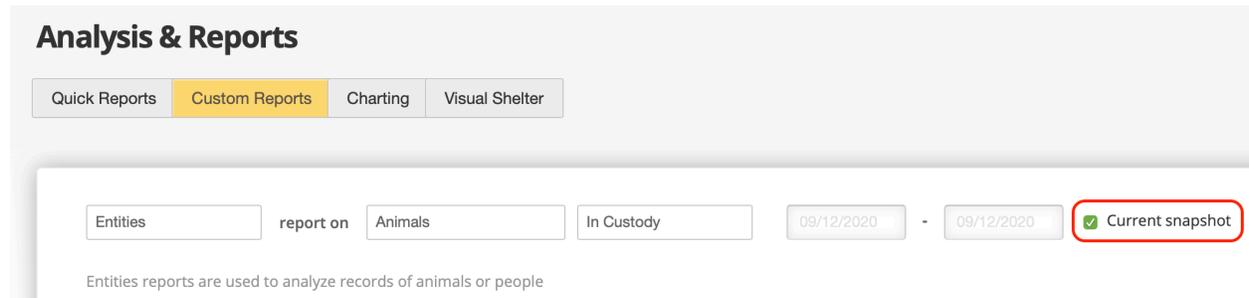
2. Click on **Custom Reports**.



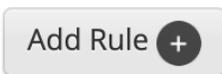
3. Click on **Select a Report type** and choose **Entities**



4. Check the checkbox called **Current snapshot**



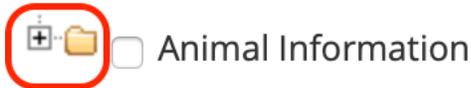
5. Click **Add Rule**



6. Check the checkbox called **Customize Report Columns**

Customize Report Columns

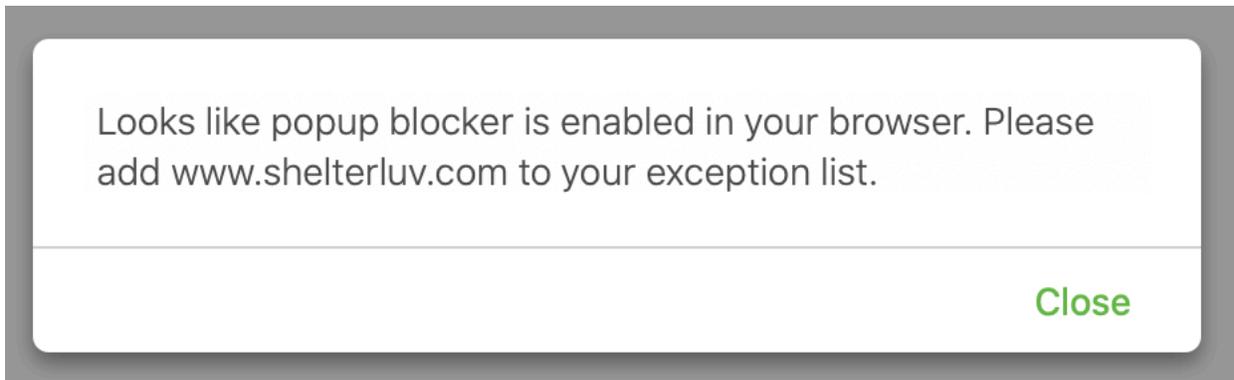
7. Click the little folder symbol next to **Animal Information** to bring up a list of all the different bits of info about an animal.



8. In the list, check **Animal ID**, **Animal Name**, and **Microchip Number**

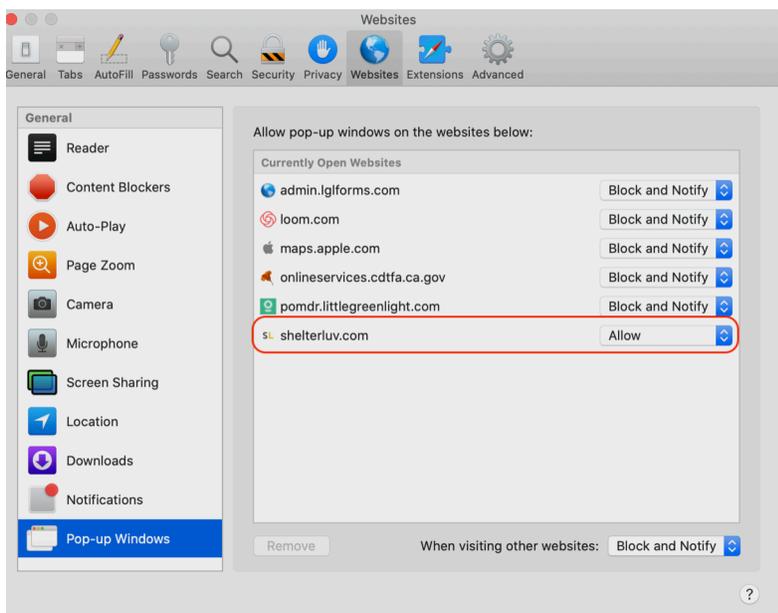
- Animal Information
 - Intake Date
 - Animal ID
 - Previous Shelter ID
 - Previous Shelter ID type
 - Internal ID (API)
 - Animal Name
 - Species
 - Primary Breed
 - Secondary Breed
 - Sex
 - Age (Y/M/D)
 - Age(Months)
 - Age Group
 - Date of Birth
 - Primary Color
 - Secondary Color
 - Pattern
 - Microchip Number
 - Adoption Category
 - Behavior Category

9. Click the blue **Run Report** button at the bottom-right of the page.
10. The first time you do this, you might get a message complaining that your browser is blocking your pop-ups. It looks like this in Safari:



If you get this message, follow these steps to allow Shelterluv to use pop-ups. (These steps are for Safari on Mac; the steps will be a little different if you use a different browser.)

- A. Click in the **Safari** menu and choose **Preferences...**
- B. Click on **Websites** at the top of the window
- C. Click on **Pop-up Windows** in the list on the left side of the window
- D. Find "shelterluv.com" in the list on the right, and choose **Allow**



Now you can close the Preferences window and click the blue **Run Report** button again.

11. A page called **View Report** will now appear. It will start out in order by Animal ID. Click the Microchip header so that it is reordered by Microchip number.

Created On	Animal ID	Name	Microchip
11/03/2017	POM-A-1401	Harold	981020017462341
05/24/2018	POM-A-1544	Carlos	981020017734071
12/27/2018	POM-A-1698	Sheeba	981020025574952
03/05/2019	POM-A-1744	Cindi Sue	46220F0618

Now all the dogs with no microchip number will be listed first, with a dash in the Microchip column. There are buttons to export this report to Excel or to a PDF file if you want.

Report Name	Entities - Animals - Custom Report
Run By	pom_mrue
Report Run	09/12/2020 14:22 pm
Date Start	09/12/2020
Date End	09/12/2020

Excel PDF

Search within these results

Created On	Animal ID	Name	Microchip
06/11/2020	POM-A-2151	Lupin	--
08/14/2020	POM-A-2228	Lewis	--
08/19/2020	POM-A-2229	Scoob	--
08/19/2020	POM-A-2230	Karris	--
08/22/2020	POM-A-2236	Vy	--

How to add a person

Before a dog can be assigned to a foster home or an adopter or taken in from a guardian, that person must be represented in Shelterluv. We keep most of the information about these people in Little Green Light (LGL), and we use the LGL ID number to identify the person definitively, since more than one person might have the same name.

1. Look up the person in LGL. You will need to get their LGL ID later. If the person is not yet in LGL, first enter the person in LGL, then come back to step 2 here.
2. Click **People** on the search bar in Shelterluv and search for the full name of the person you want to add. Be sure the name exactly matches the name in LGL — a good way to do this is to copy the name from LGL and paste it here.
3. If the person is already in Shelterluv, great, use them. But confirm it is the same person first by checking LGL account numbers or comparing dogs they have adopted or cared for. Ensure that Shelterluv has the address, email, and phone number by adding them if necessary.
4. If the person does not exist, then look for a green **Add New+** button above the list of found people, or (if no people at all were found) look for a **create a new person** link. Click the button or the link.
5. Enter the person's first and last names exactly as they appear in Little Green Light. Also add their exact address, email, and phone number from LGL. If they have multiple phone numbers in LGL, try to use a mobile/smart phone number.
6. Click the blue **Save** button. A new person record will be made.

7. Click the link titled **Update Previous IDs or View History**.

The screenshot shows a user profile interface with several tabs: Profile, Attributes, Animals, Purchases, Memos, and Person History. To the right of these tabs is a green 'Edit Record' button. Below the tabs, there are three input fields: 'Address Refused', 'Phone Refused', and 'Add Email'. At the bottom of the profile section, there are two links: 'Update Previous IDs or View History' (highlighted with a red circle) and 'Update Address or View History'.

8. Copy from LGL the person’s ID# and insert it in the **Previous Shelter ID** section, then add “LGL “ in front. If you start by typing “LGL”, be careful that auto-complete doesn’t fill in some other ID. Leave **Previous Shelter ID Type** alone. You can select “**Peace of Mind Dog Rescue**” for the **Previous ID Issuing Shelter**.

The screenshot shows a form with three main sections. The first section is 'Previous Shelter ID' with a text input field containing 'LGL 1158827'. The second section is 'Previous Shelter ID Type' with a dropdown menu showing '--Select--'. The third section is 'Previous ID Issuing Shelter' with a dropdown menu showing 'Peace of Mind Dog Rescue'. At the bottom of the form are two buttons: 'Cancel' and 'Save'.

9. Hit **Save**

10. If you know the new person wants to foster dogs in the future, click the **Attributes** tab and check the **Willing Foster** checkbox. Ignore the **Foster Profile** window that appears (you can close it with the **X** in the upper right corner, or click the gray **Close** button).

The screenshot shows the 'Person's Attributes' section of the profile page. It has tabs for Profile, Attributes, Animals, Purchases, and Mem. Under the 'Attributes' tab, there are three checkboxes: 'Do Not Adopt', 'Warning! -- Safety Note', and 'Willing Foster'. The 'Willing Foster' checkbox is checked with a green checkmark.

How to intake a dog that came from a shelter

1. Click the + on top of the page, just to the right of the word **Shelterluv**
2. In the **IN** column, click **Transfer**

IN	OUT
Stray	Adoption
Transfer	Transfer
Owner Surrender	Return to Owner
Feral / Wildlife	Feral / Wildlife
Born in Care	Medical
Service	Service

3. Click the blue **Add** button next to the shelter the dog is coming from
4. Click **New Transfer From**

ANIMALS | PEOPLE | PARTNERS | TRANSACTIONS

Search Partners Add Partner to Your List +

Last Transfer	Name	Type	Action
01/14/2020	Monterey County Animal Services	Government Shelter with Animal Control	Add
01/09/2020	Salinas Animal Shelter	Government Shelter with Animal Control	Add
12/27/2019	San Jose Animal Care Services	Government Shelter with Animal Control	New Transfer From New Transfer To New Stray From New Service In New Service Out Build Transport List
12/21/2019	SPCA for Monterey County	Brick & Mortar Shelter - No Animal Control	Add
12/13/2019	Best Friends-Utah		Add
11/18/2019	Hollister Animal Shelter	Government Shelter with Animal Control	Add

5. Fill out the **Transfer In** panel as follows:
- **Intake Information** section:

Transfer In

Intake Information

Intake Sub-type *

Intake Date * 

Intake Into *

Intake Notes

Location *

Current Status * [Why this list?](#)

[+Add Review Date](#)

- You can ignore **Intake notes**
- Set the **Current Status** to **No Foster Groups**. This prevents the dog's info from being sent to other rescue groups for now.

- **Biological Information** section:

Biological Information

Animal Name *

Species *

Sex *

Altered Before Arrival *

Primary Breed *

Secondary Breed

Color *

Size (lbs) *

Age Group *

Estimated Birthdate
 

- Enter as much biological information you can gather from the kennel records.

- **Identifying Information etc**

The screenshot shows a web form with three main sections. The first section, titled "Identifying Information", contains two input fields: "Microchip Type" with a dropdown menu showing "--Select--" and "Microchip Number" with a text input field. The second section, titled "Photo & Video", features a large black plus sign icon inside a dashed rectangular box. The third section, titled "Memos", has a "Type" dropdown menu with "Kennel Card / Web Site Memo" selected, and a "Memo" text input field. Below the "Memo" field is a blue link that says "Add Another Memo to Record". At the bottom right of the form is a blue button labeled "Create Record".

- If there is a microchip number listed, include it. Otherwise leave it blank.
 - Click the big **+** under **Photo & Video** and choose a photo from your imported photos. For more details, see the section of this document called "**How to add photos**".
 - Under **Memos**, change the **Type** to **History** and enter the dog's behavior evaluation. That should come from Allison/Kalman/Gina
6. Click the blue **Create Record** button
 7. Go to "see animal's records" to verify the information you just input is correct
 8. Now we'll add the initial **Status** memo. Click on the **Memos** tab.
 9. Set the **Type** to **Pop-up**.

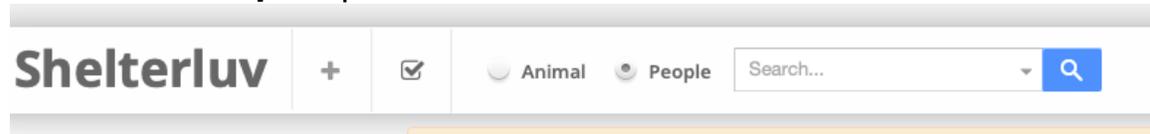
10. For the **Memo** text, type “Status: ”. If you know the date of this dog’s intake exam, include that too. (Otherwise, just leave it as “Status: ”, and it will be filled in later.)
11. Click the blue “**POST**” button to create the new memo. It should now appear at the top of the dog’s record, looking like this:

Status: Intake Exam 7/18



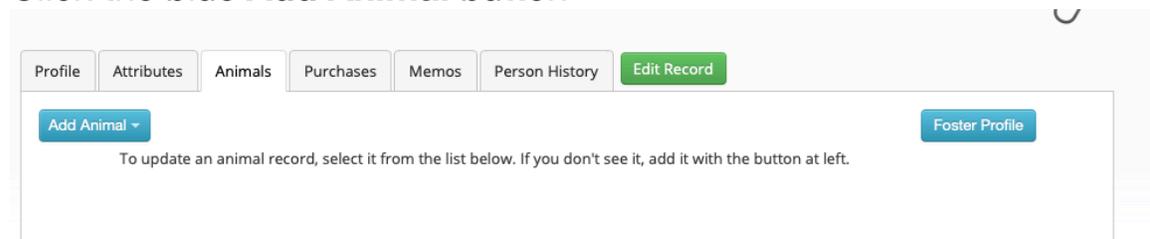
How to intake a dog that was surrendered by their guardian

1. Select the **People** option next to the search bar

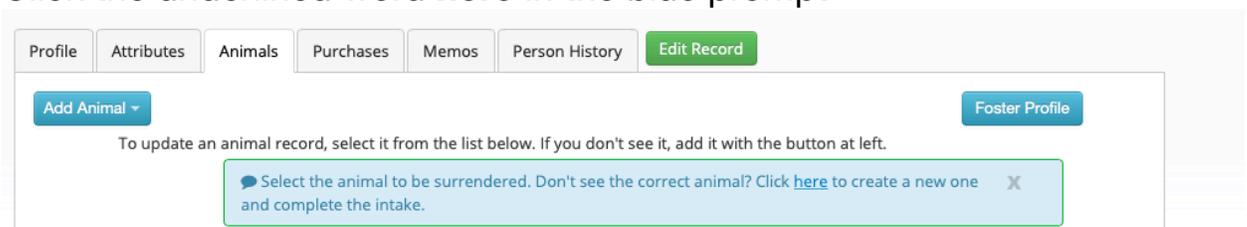


2. Search for the surrendering guardian's name
3. If the person appears in the search results, select them and go to step 4. But often the person will not be there yet, so follow the steps in the **How to add a person** section of this document to add them. This should leave you on the person's profile page.
4. Click on the **Animals** tab.
5. Check if the dog is already listed on this page. If it is already listed, **go to step 10**. If it is not already listed, **continue to step 6**.

6. Click the blue **Add Animal** button

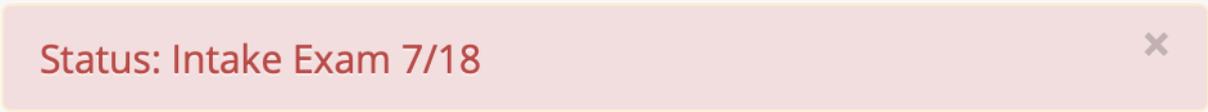


7. Click **Owner Surrender**
8. Click the underlined word **here** in the blue prompt



9. Enter all the information you have about the dog and click **Finish** at the bottom of the form.
10. Now we'll add the initial **Status** memo. Click on the **Memos** tab.
11. Set the **Type** to **Pop-up**.

- 12. For the **Memo** text, type “Status: ”. If you know the date of this dog’s intake exam, include that too. (Otherwise, just leave it as “Status: ”, and it will be filled in later.)
- 13. Click the blue **“POST”** button to create the new memo. It should now appear at the top of the dog’s record, looking like this:



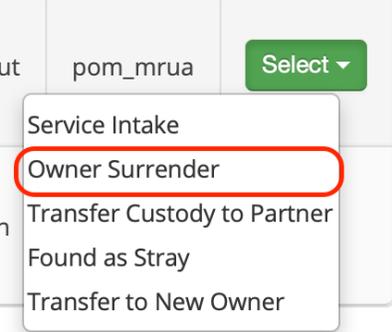
You are done with the case where the dog was not already in Shelterluv

- 14. This is the rest of the case where the dog was already listed. Click the green **Select** button on the right side of the line representing the dog to be surrendered.

To update an animal record, select it from the list below. If you don't see it, add it with the button at left.

Photo	Date	Species	Name	Breed	Color	Animal ID	Event	By	Action
	05/27/2020	Dog	Fred	Shih Tzu	Brown/White	POM-A-2128	Service Out	pom_mrue	Select ▾

- 15. Choose **Owner Surrender** from the pop-up menu.



- 16. The **Select** button is replaced by a gray **Complete Surrender** button. Click that button.
- 17. Up comes the **Intake - Owner Surrender** form. Fill out **Intake Sub-type**, **Intake Date**, **Location**, and **Status**. If the dog is going to remain with its previous owner, set the location to **With Previous Owner** and

the status to either **Previous Owner Holding Awaiting Foster** or **Previous Owner Holding Through Adoption**.

18. Check that the other automatically-filled information is correct.

19. Click **Finish** at the bottom of the form.

20. If the dog is going to remain with its previous owner, add a Pop-up memo to the dog's record that explains the situation, like this one:

Being surrendered back to POMDR. Currently with Bren, adopter who is returning Valentina.



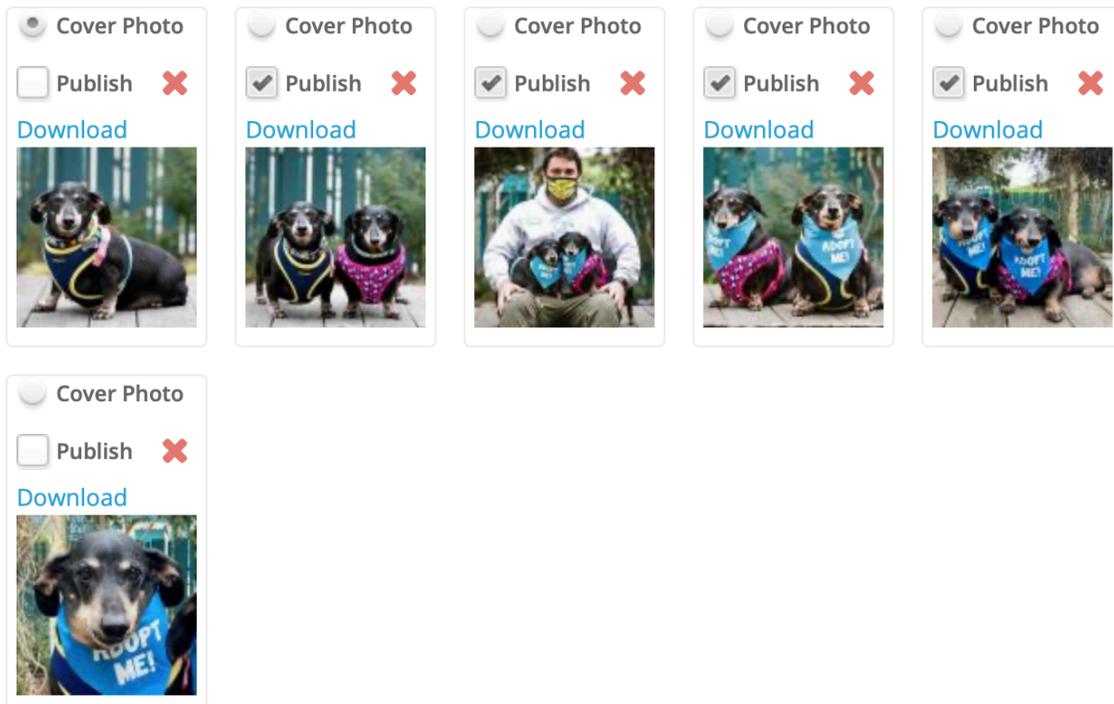
How to intake a dog that is being returned to POMDR

Returned dogs are dogs that were previously adopted out by Peace of Mind Dog Rescue and for whatever reason are now coming back to our program.

1. Do a **People** search at the top of a Shelterluv page to find the surrendering guardian. They should appear in the search results since they have already adopted from us.
2. Click the person's name to go to their profile
3. Click the **Animals** tab to see all dogs they currently have
4. Find the dog in question, and click the green **Select** button on the right side of that row
5. Choose **Return** from the drop down menu. This will take you to a "confirm return" page
6. Process the dog into Shelterluv like you would for an intake of a dog that was surrendered by their guardian
7. Check if the dog has a "**Status:**" Pop-up memo. If not, create one like you would for an intake of a dog from the shelter or surrendered by its guardian.

How to intake a bonded pair of dogs

1. For the first dog, start by following the instructions for “**How to intake a dog that was surrendered by their guardian**” or “**How to intake a dog that came from a shelter**”
2. Add a Pop-up memo to the Dog’s Profile that says “Bonded Pair with _____” so it’s easy to identify who their partner is.
3. Upload a photo of the dog by itself to be used for identification purposes and upload the set of photos of the bonded pair as well.
4. Make sure the thumbnail on the main Shelterluv landing page is of just the one dog to identify them, as follows:
 1. Go to the photos section of the dog’s profile
 2. Check “cover photo” on a photo of the dog by itself but **DO NOT** check “publish” because that determines which photos go to rescue groups and we want the dogs represented as a bonded pair on rescue groups.
 3. Check “Publish” for all of the photos of the pair of dogs that you would like sent to rescue groups. When you are done, the photos should be configured like this:



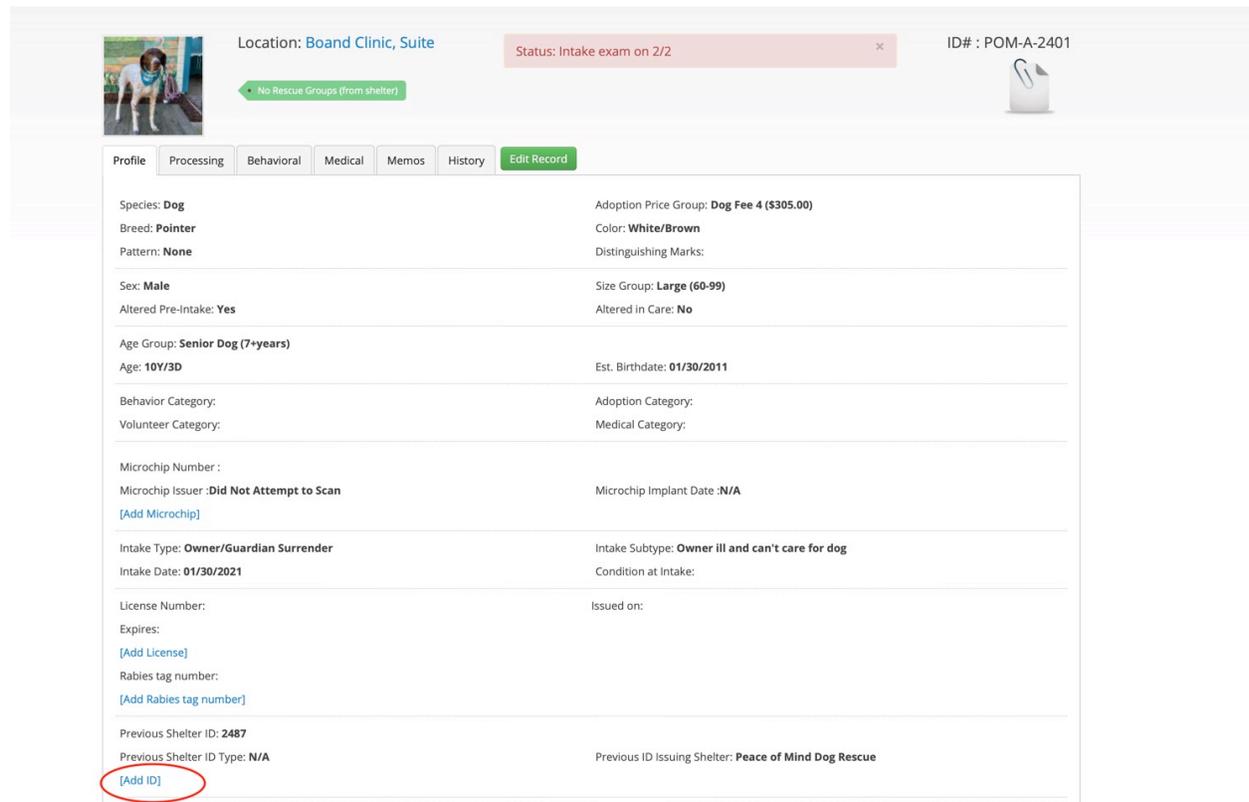
5. Click on the “Processing” tab, then click “Attributes”, then check the box for “Bonded”. That will add a green “bonded” tab to their main profile page.
6. Repeat steps 1 - 5 for the second dog.

How to enter a dog's silver tag ID number

Each dog taken into POMDR's care is given a silver tag with a unique ID number to wear on its collar. This can help with identification if the dog is every lost and then found. For a while, this ID number was the same as the last four digits of the Shelterluv ID (e.g., for a Shelterluv ID of "POM-A-1234" the silver tag ID number would be "1234"). Starting with dog #2384, this is no longer the case; now the two numbers are different.

Now, every time you put a new silver tag on a dog, you must enter the ID number from the silver tag into the dog's record. Here are the steps:

1. Go to the dog's record, and click **[Add ID]** near the bottom of the page.



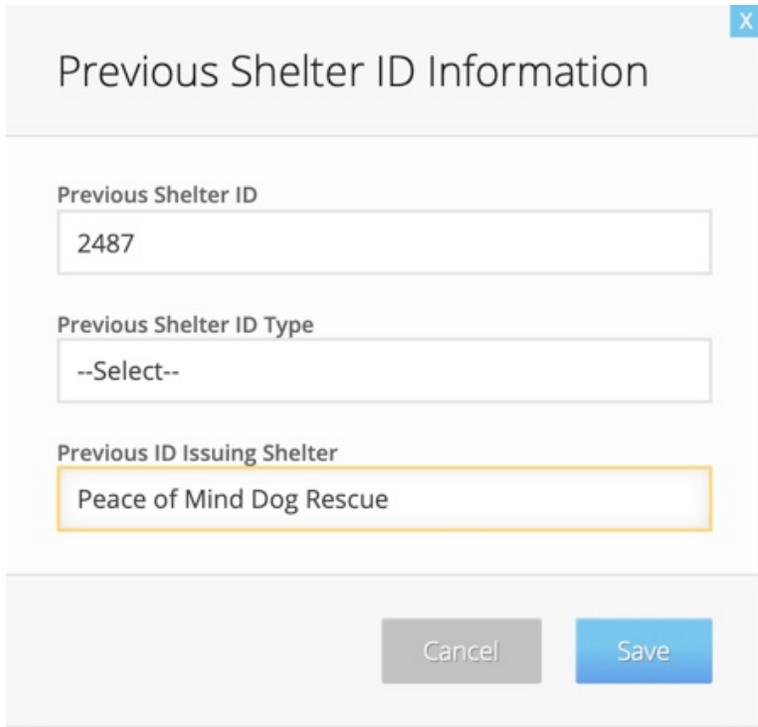
Location: [Boand Clinic, Suite](#) Status: Intake exam on 2/2 ID# : POM-A-2401

No Rescue Groups (from shelter)

Profile Processing Behavioral Medical Memos History **Edit Record**

Species: Dog	Adoption Price Group: Dog Fee 4 (\$305.00)
Breed: Pointer	Color: White/Brown
Pattern: None	Distinguishing Marks:
Sex: Male	Size Group: Large (60-99)
Altered Pre-Intake: Yes	Altered in Care: No
Age Group: Senior Dog (7+years)	Est. Birthdate: 01/30/2011
Age: 10Y/3D	Adoption Category:
Behavior Category:	Medical Category:
Volunteer Category:	
Microchip Number :	Microchip Implant Date : N/A
Microchip Issuer : Did Not Attempt to Scan	
[Add Microchip]	
Intake Type: Owner/Guardian Surrender	Intake Subtype: Owner ill and can't care for dog
Intake Date: 01/30/2021	Condition at Intake:
License Number:	Issued on:
Expires:	
[Add License]	
Rabies tag number:	
[Add Rabies tag number]	
Previous Shelter ID: 2487	Previous ID Issuing Shelter: Peace of Mind Dog Rescue
Previous Shelter ID Type: N/A	
[Add ID]	

2. Enter the ID number on the silver tag into the **Previous Shelter ID** field. Leave the **Previous Shelter ID Type** field empty. Select “Peace of Mind Dog Rescue” as the **Previous ID Issuing Shelter**, as shown here:



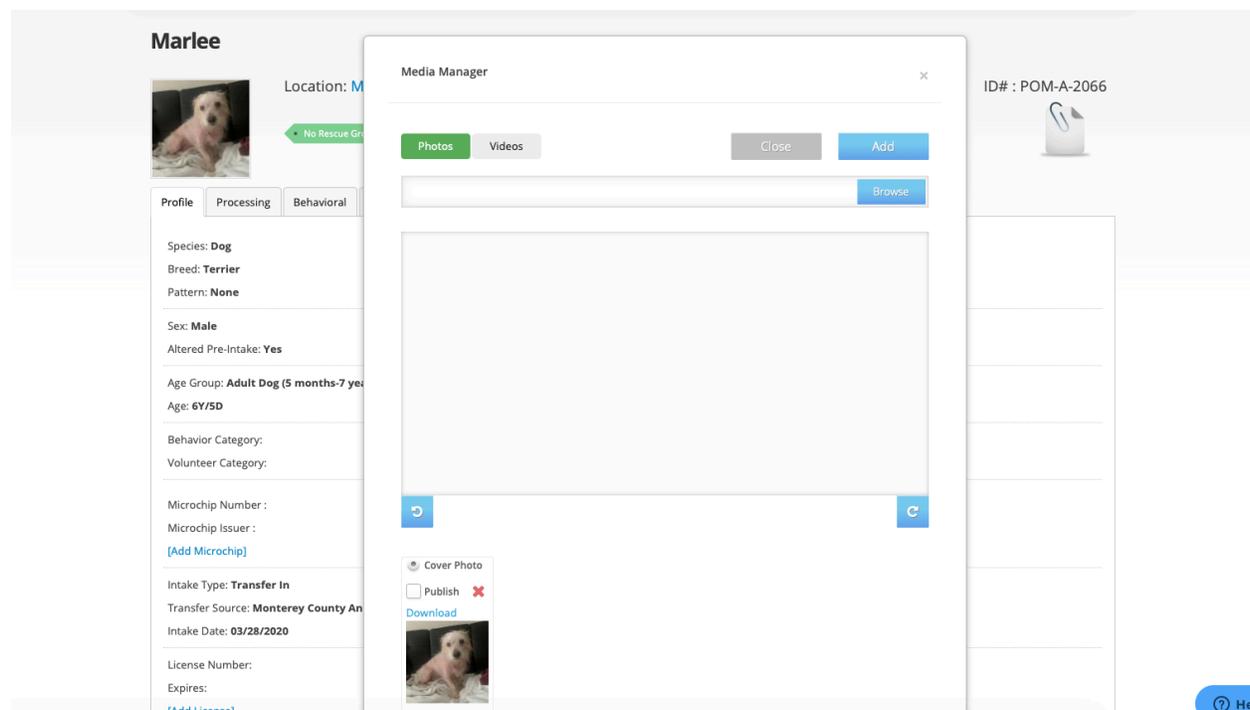
The image shows a software window titled "Previous Shelter ID Information" with a close button (X) in the top right corner. The window contains three input fields and two buttons at the bottom. The first field, labeled "Previous Shelter ID", contains the number "2487". The second field, labeled "Previous Shelter ID Type", contains "--Select--". The third field, labeled "Previous ID Issuing Shelter", contains "Peace of Mind Dog Rescue" and is highlighted with a yellow border. At the bottom of the window are two buttons: "Cancel" (grey) and "Save" (blue).

Field Label	Value
Previous Shelter ID	2487
Previous Shelter ID Type	--Select--
Previous ID Issuing Shelter	Peace of Mind Dog Rescue

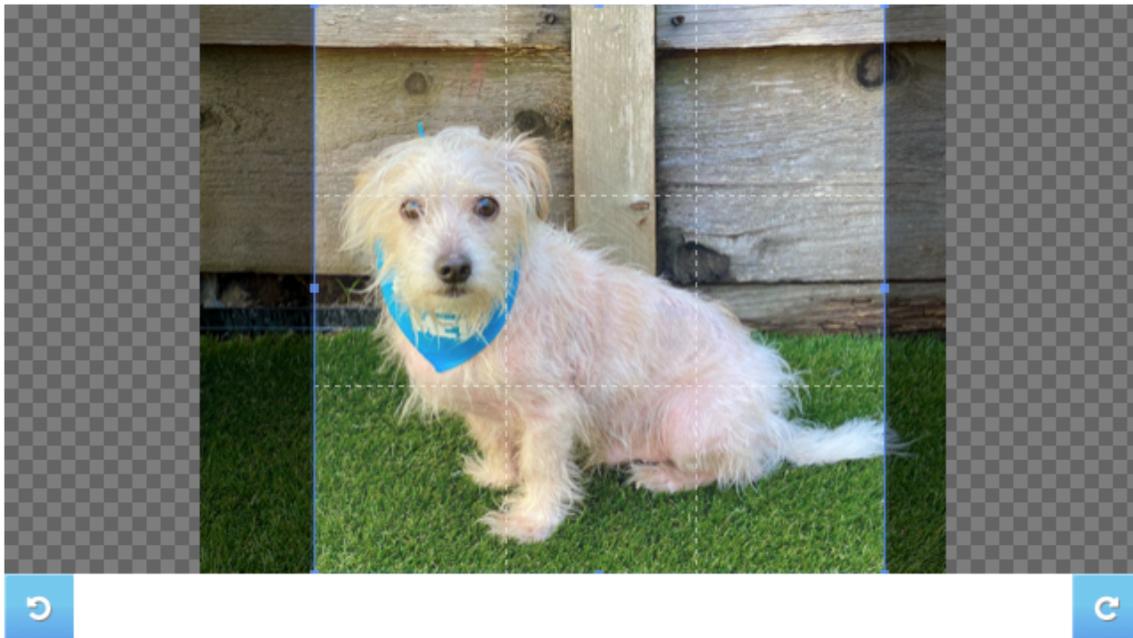
How to add photos

Photos in a dog's record are used in a few different ways. They are used within Shelterluv for recognition at a glance. They are used to print out kennel cards for dogs being housed. And they are sent to other rescue groups to help get the dog adopted.

1. Start with one or more high-resolution, high-quality .jpg files. You can create one by exporting from the Mac's **Photos** app, or maybe a foster home will send you one. If you don't have any high-quality photos, use the best photos you have. (It's better to have a bad photo than no photo at all.)
2. Find the dog's record, following the steps in the section of this document called "**How to find a dog's record**".
3. Click on the dog's name to show the details of the dog's record.
4. Click on the dog's photo underneath their name to bring up the **Media Manager** window. (If the dog doesn't yet have any photos, there will be a line drawing of a dog where the photo would otherwise be. Click on that.) Here's what it looks like when there is a single photo:

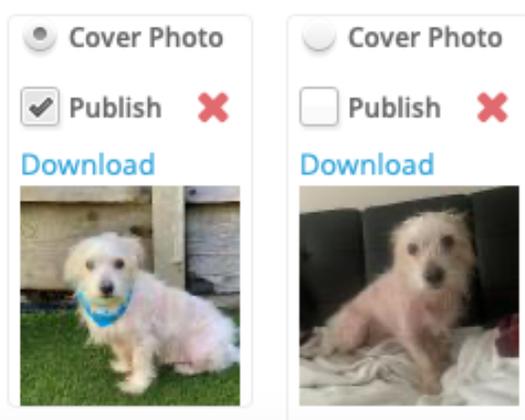


5. Click the blue **Browse** button and choose the new photo (that you selected back in step 1) from your computer's file system. Alternatively, you can drag a photo and drop it onto the **Browse** button.
6. The chosen photo will appear in the middle of the **Media Manager** window. Shelterluv stores all photos as squares, so often there will be some extra hunks of the original photo on the left and right, or top and bottom. You can drag the photo around to best position the square. You can also zoom in closer by dragging the little blue handles on the corners and sides of the square. If the photo is sideways or upside down, click the blue rotation arrows beneath the photo until it's oriented correctly.



7. When you're happy with the appearance of the square part, click the blue **Add** button. The now-square photo will appear at the bottom of the window along with any others that were already there.
8. Each dog has one "cover photo", which is used within Shelterluv as the standard picture of the dog, and also shown more prominently on other rescue groups. The ideal cover photo would be an appealing full-body image. Look over the photos for this dog and click **Cover Photo** for the best one.

9. Choose which photo(s) to publish to rescue groups like PetFinder. They typically use no more than three, so look through the photos and choose up to three good ones and then check **Publish** for each of these (uncheck any older ones that were previously checked but aren't as good as the new ones). The cover photo should be one of these three, unless none of the photos including the cover photo are good enough to publish. In this example, the new photo has been made the cover photo and published, and the old photo is not published because it isn't good enough. If the only photos you have aren't very good, uncheck **Publish** even if that means that no photos are published.



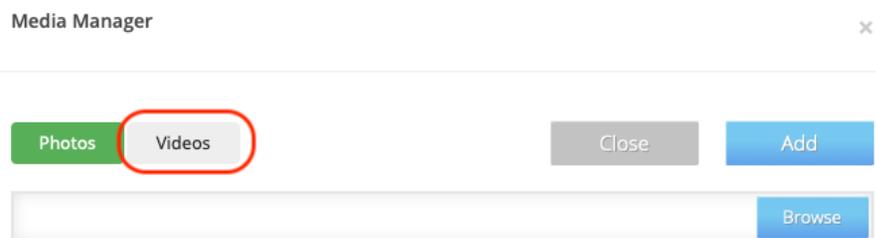
There are additional steps required to publish a dog's info to other rescue groups, as explained in the section of this document called "**How to add a dog to rescue groups**".

If you want to delete a photo from Shelterluv, click the red **X** to the right of the Publish checkbox, and click **OK** to confirm. Normally you don't need to delete old photos though, you can just uncheck **Publish** to make sure they don't get sent to rescue groups.

How to add videos

In addition to photos, videos can be added to Shelterluv and sent to other rescue groups. Adding videos is very similar to adding photos.

1. Put the video in POMDR's YouTube account. Only videos from this account can be added to Shelterluv.
2. Find the dog's record, following the steps in the section of this document called "**How to find a dog's record**".
3. Click on the dog's name to show the dog's record.
4. Click on the dog's photo underneath their name to bring up the **Media Manager** window. (If the dog doesn't yet have any photos, there will be a line drawing of a dog where the photo would otherwise be. Click on that.)
5. Click on **Videos**.



6. In another browser window or tab, navigate to POMDR's YouTube account and find the video in question. Get the shareable link for the video, and paste it into the text field in the Media Manager window.

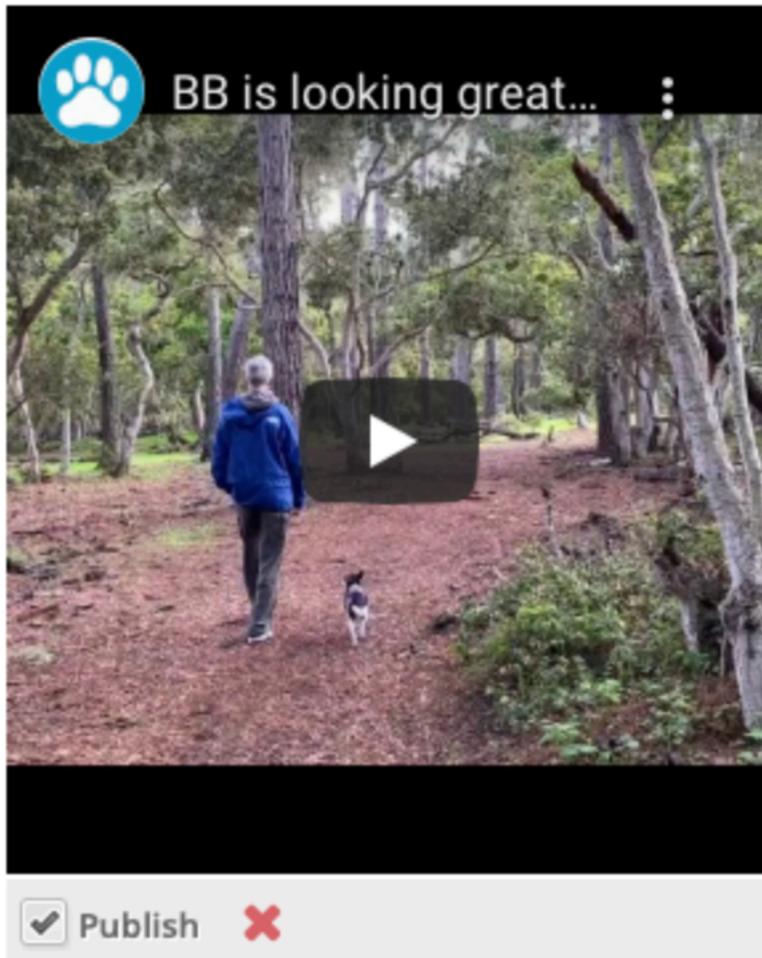


Paste link to Youtube video below



7. Click the blue **Add** button.

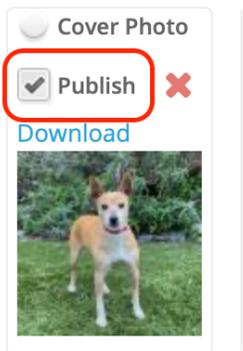
8. If the dog is adoptable (as is the usual case when you are adding a video), check **Publish** beneath the image of the newly-added video.



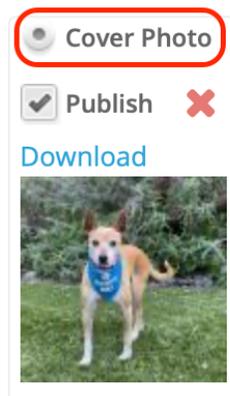
How to add a dog to rescue groups

In Shelterluv, “rescue groups” means other organizations that can display info about POMDR’s dogs to help get them adopted, such as PetFinder. When a dog first comes to POMDR, they are set with a No Rescue Groups property so that their incomplete info isn’t published to these other groups yet. These are steps for making their info complete enough, and actually publishing the info.

1. Do an **Animal** search at the top of a Shelterluv page to find the dog in question, then click on the dog’s name to go to their profile page.
2. Add publishable photos of the dog: Click on the existing photo or icon on the top left of the page and add full resolution photos. Be sure to select **Publish** for each photo you want to publish. For more details on how to create photos and decide which ones to publish, see the section called “**How to add photos**”



3. Click **Cover Photo** on the photo that should be the main photo featured on the rescue group websites.



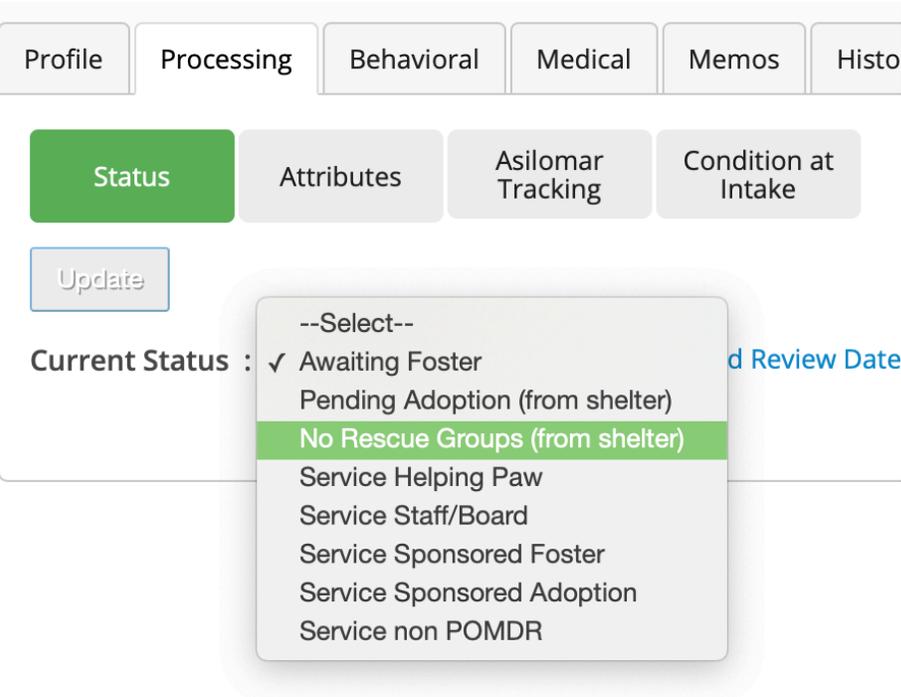
4. Go to the **Memos** tab on the dog's profile page.
5. Look for an existing memo called **Kennel Card / Web Site Memo**. If it doesn't exist, make a new memo of type **Kennel Card / Web Site Memo** Copy the dog's bio from the POMDR website and paste it here, then click **Post**.
6. If the **Kennel Card / Web Site Memo** does already exist, verify that it's up to date. If not, click **Edit**, then copy the dog's bio from the POMDR website, delete the current text, paste the text you copied, then click **Update**.
7. Go up to the tabs and click on **Processing**. if the dog's **Current Status** is set to **No Rescue Groups (from foster)** or **No Rescue Groups (from shelter)** then they are not viewable on rescue groups. Choose the appropriate status (e.g. **Awaiting Foster** or **In Foster Home (regular)**) to cause the dog's info to be published to rescue groups.

How to remove a dog from rescue groups

In most cases when a dog is adopted or has passed away, they will automatically be removed from Rescue Groups when their outcome is processed. Occasionally, we will need to remove a dog from Rescue Groups, but they won't have an outcome to record yet. For instance if they have a behavior issue or have been lost temporarily, and we need to make them not adoptable until we figure out a plan for them. Here are the steps to do that.

In these cases, Go to the dog's record. Click on the "processing" tab, and click on the box that says "current status"

1. Do an **Animal** search at the top of a Shelterluv page to find the dog in question, then click on the dog's name to go to their profile page.
2. Click on the **Processing** tab.
3. For **Current Status**, select either **No Rescue Groups (from shelter)** or **No Rescue Groups (from foster)**. (Only one of these choices will be available, depending on the dog's current status.)



The screenshot shows a web interface for a dog's profile. At the top, there are tabs: Profile, Processing (selected), Behavioral, Medical, Memos, and Histo. Below the tabs are buttons for Status (highlighted in green), Attributes, Asilomar Tracking, and Condition at Intake. There is also an Update button. The 'Current Status' field is open, showing a dropdown menu with the following options: --Select--, Awaiting Foster (checked), Pending Adoption (from shelter), No Rescue Groups (from shelter) (highlighted in green), Service Helping Paw, Service Staff/Board, Service Sponsored Foster, Service Sponsored Adoption, and Service non POMDR. To the right of the dropdown, there is a 'Review Date' field.

Which dogs are published to other rescue groups?

Whether a dog's info is published to other rescue groups (PetFinder, etc) is controlled entirely by the dog's current **Status**. Here are the current set of statuses. The **Publish** column shows whether dogs in this status are published to other rescue groups or not.

In Foster Statuses

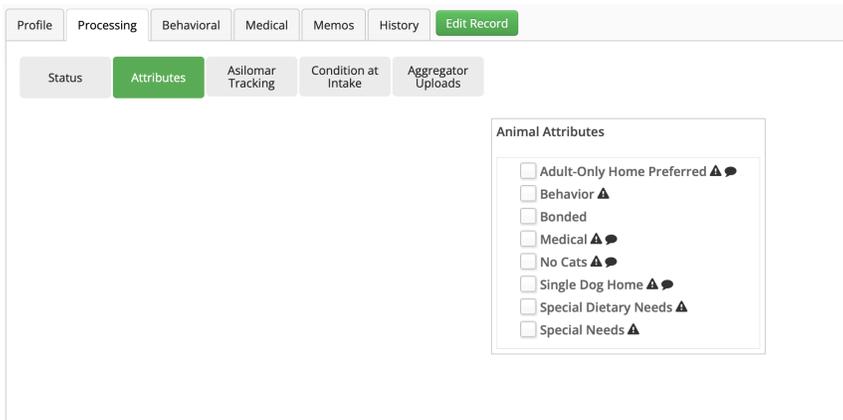
Status Name [?]	Status Description [?]	Publish [?]
In Foster Home (regular)		Yes
In Foster Home (temp)		Yes
In Foster Home (waiting for new foster)		Yes
In Foster-to-Adopt		No
Hospice	Not adoptable	No
No Rescue Groups (from foster)	This dog will not have its bio and photos uploaded to rescue groups	No

In Shelter Statuses

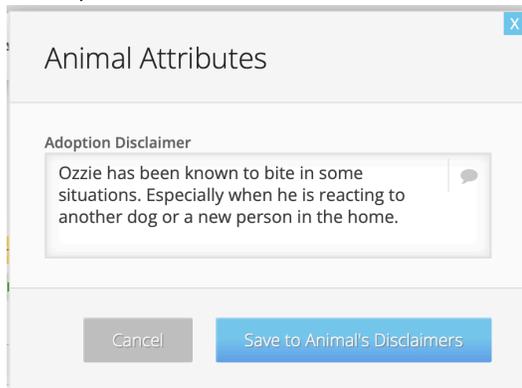
Status Name	Status Description	Publish
Awaiting Foster	Temporary status used until the foster home is set up in Shelterluv	Yes
Previous Owner Holding Through Adoption		Yes
Previous Owner Holding Awaiting Foster		Yes
Pending Adoption (from shelter)		No
No Rescue Groups (from shelter)	This dog will not have its bio and photos uploaded to rescue groups	No
Service Helping Paw	Helping Paw animals currently in service (typically at clinic)	No
Service Staff/Board	Staff/Board animals currently in service (typically at clinic)	No
Service Sponsored Foster	A POMDR foster that has a sponsor currently in service (typically at clinic)	No
Service Sponsored Adoption	An adopted dog with a sponsor that is currently in service (typically at clinic)	No
Service non POMDR	A non POMDR animal that is currently in service (typically at clinic), such as treating injury caused by a POMDR dog	No
Pre-Intake Helping Paw	Helping Paw animals that aren't in the system yet and have pending medical care	No
Pre-Intake Staff/Board	Staff/Board animals that aren't in the system yet and have pending medical care	No
Pre-Intake non POMDR	non POMDR animals that aren't in the system yet and have pending medical care	No

How to add attributes and disclaimers for a dog

1. Look up the dog in Shelterluv (follow the steps in the section of this document called **How to find a dog's record**).
2. Click the dog's name in the search results to go to their record.
3. Click the **Processing** tab, then click **Attributes**. You will see a list of potential attributes.



4. For each attribute that is appropriate for this dog, click the checkbox. In some cases (e.g. **Bonded**), that's all you do, and you can move on to the next attribute. In most cases, a screen will pop up that lets you supply more information. For example, if a dog needs a bite clause, you would click **Behavior** and then enter text similar to the following picture, then click **Save to Animal's Disclaimers**.



Note: Some of the attributes are included as disclaimers on the adoption contract. These attributes are marked with the ⚠️ symbol.

Note: Some of the attributes include standard text that you can edit as appropriate for this dog. These attributes are marked with the 💬 symbol.

When and how to change a dog's name

Dogs can get several different names after they first come to POMDR. The initial name either comes along with the dog or is assigned by the office staff. This name is used when the dog is entered into Shelterluv and is also entered into the POMDR DB so that it appears on the POMDR website. Let's call this the **POMDR Name**.

Sometimes a foster parent will start using a different name for the dog. Let's call this the **Foster Name**. When this happens, the dog's name in Shelterluv should be changed to "**POMDR Name (aka Foster Name)**".

After the dog is adopted, it will have a permanent name, which might be the **POMDR Name** or the **Foster Name** or something else. We'll call this **Permanent Name**. If the dog is being seen at our clinic, the dog's name should be changed to incorporate this name, as follows:

If the permanent name is different than the foster name and that's different from the POMDR name, use "**Permanent Name Adopter's Last Name (was POMDR Name aka Foster Name)**". If any of the names are the same, you can leave them out, e.g. "**Permanent Name Adopter's Last Name (was POMDR Name)**" or "**Permanent Name Adopter's Last Name (was Foster Name)**" or just "**Permanent Name Adopter's Last Name**".

Example: Dog is initially named Ruffles but foster calls him Bailey and adopter Jane Doe calls him Yappy. Final name in Shelterluv would be "Yappy Doe (was Ruffles aka Bailey)". If the foster continued to use Ruffles and the adopter Jane Doe calls him Yappy, the final name in Shelterluv would be "Yappy Doe (was Ruffles)". And if everyone including the adopter called him Ruffles the final name in Shelterluv would be "Ruffles Doe".

To make these changes:

1. Look up the dog in Shelterluv (follow the steps in the section of this document called **How to find a dog's record**)
2. Click the dog's name in the search results to go to their record
3. Click the green **Edit Record** button

Shelterluv + [checkmark] Animal People Search... [magnifying glass] Help pom_cbroecker [shopping cart] [gear]

King Tut

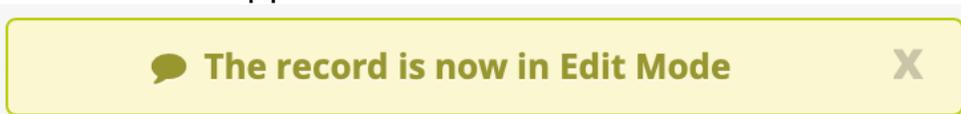
Location: [Monica Rua](#) Staff/Board/Volunteer ID#: POM-A-3059

• Healthy In Home
• Good with Dogs • Medical

Profile Processing Behavioral Medical Memos History **Edit Record**

Species: Dog	Adoption Price Group: Dog Fee 4 (\$305.00)
Breed: Terrier	Color: Black/White
Pattern: None	Distinguishing Marks:
Sex: Male	Size Group: Small (1-19)
Altered Pre-Intake: No	Altered in Care: To be determined
Age Group: Adult Dog (5 months-7 years)	Est. Birthdate: 09/09/2021
Age: 1Y/5M/11D	Adoption Category:
Behavior Category:	Medical Category:
Volunteer Category:	
Microchip Number: 981020041300675	

- The green button's title will change to **Exit Edit Mode** and a little pop-up reminder will appear:



- Click on the name, which now has a dotted underline.

King Tut



Location: [Monica Rua](#)

• Healthy In Home
• Good with Dogs • Medical

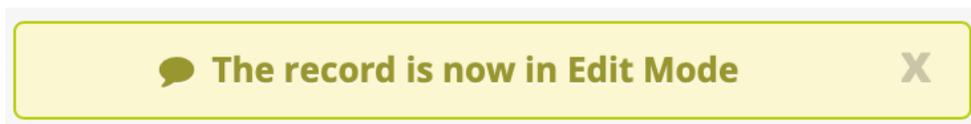
- Click the green **Exit Edit Mode** button to save your changes.

How to update basic info about a dog

1. Look up the dog in Shelterluv (follow the steps in the section of this document called **How to find a dog's record**)
2. Click the dog's name in the search results to go to their record
3. Click the green **Edit Record** button



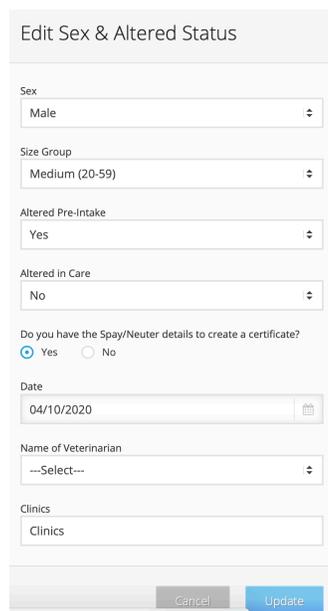
4. The green button's title will change to **Exit Edit Mode** and a little pop-up reminder will appear:



5. At this point all of the displayed information can be directly edited.

The most commonly changed information includes the dog's name, **Microchip Number** and **Microchip Issuer**, weight, and **Altered in Care**.

If you click on **Altered in Care**, you'll get a form to fill out. If you supply the info at the bottom of the form, a spay/neuter certificate will be automatically created and added to the attachments.

A screenshot of a mobile form titled "Edit Sex & Altered Status". The form contains several dropdown menus and a radio button. The fields are: Sex (Male), Size Group (Medium (20-59)), Altered Pre-intake (Yes), Altered in Care (No), Do you have the Spay/Neuter details to create a certificate? (Yes selected), Date (04/10/2020), Name of Veterinarian (---Select---), and Clinics (Clinics). At the bottom, there are "Cancel" and "Update" buttons.

To edit the weight, stay in Edit Mode and click the **Medical** tab, then click **Medical Summary** if it isn't already highlighted:

The screenshot shows a software interface with a top navigation bar containing tabs: Profile, Processing, Behavioral, Medical, Memos, and History. Below this, a sub-menu is visible with buttons for Medical Summary (highlighted in green), Diagnosis, Diagnostic Tests, Vaccines, and Other. A Health Consults button is also present. Below the buttons are three action buttons: Mark Medical Outcome, Create Litter, and Custom form. The interface displays the following information:

- Est. Birthdate: **12/15/2018**
- Spay/Neutered Date: **No S/N Information**
- Weight: **50 lbs**

Then click on **Weight**, enter the new weight, and click **Update**.

6. When you're done making the desired changes, click the green **Exit Edit Mode** button.

How to add notes to a dog's history

History memos detail all the internal notes for a dog from day one. These are really helpful to understand the full picture of the dog and should always be shared with fosters and adopters.

The clinic will email their "Patient Notes" or laymans's terms for exams, rechecks and procedures they saw that day. They usually send these after you've taken off for the evening so look for it first thing when you come in. Those updates need to be in Shelterluv and communicated with the foster. Add the update for each dog to the history memo and communicate the update to the dog's foster (by email, text, or phone.) Here are the instructions for adding them to SL.

This is an example of what the clinic emails look like:

Clinic

Yesterday at 4:20 PM

1/13/2020 Patient notes

[Details](#)



To: Monica Rua, Angela Zepp, Bryan Van Loh, Dr. Kim Wilkins & 3 more

SamSam- castration site completely healed. Finally!!!. Hematoma has resolved. No further follow-up needed

Doug-recheck oral exam after extractions and oral nasal fistula- good healing. Advised one more week of soft food

Yara- skittish and difficult to handle. Performed routine dental prophylaxis. Extracted 1x PM tooth (405).

Soft food x 7d

Performed spay. Needs 12 days of restricted activity and staple removal in 12 days.

Sent with RX of Tramadol for pain

Anya- owner was not given instructions to fast. I elected to wait until PM to do her and we changed to Spay and dental.

She did well with spay and dental and is going home on pain meds

She needs to return later for mastectomy in 2-4 weeks

Lukas- dropped in for persistent coughing despite course of AB.

Prev. diagnosed w/ heart murmur and enlarged heart. Dog has an enlarged testicle and horrible teeth, so will need extensive anesthesia and surgery.

strongly rec a cardiac consult with Dr Lesser before anesthesia

Princess Bride- came in for recheck. She had a soft swelling under a portion of the incision. I drained 8 cc of fluid from the swelling, which hopefully is a seroma. Schedule recheck for 2 weeks. If reoccurs, we may have to go back and establish drainage again.

1. Copy the memo for a dog (in this example, Sam Sam)

2. Look up the dog in Shelterluv (follow the steps in the section of this document called **How to find a dog's record**)
3. Click the dog's name in the search results to go to their record
4. Select the **Memos** tab

Sam Sam aka Sammy



Adopted

• Healthy In Home

Profile

Processing

Behavioral

Medical

Memos

History

Edit Record

Species: **Dog**

Adoption Price Group: **Dog Fee 4 (\$305.00)**

Breed: **Collie, Border/Mixed Breed (Medium)**

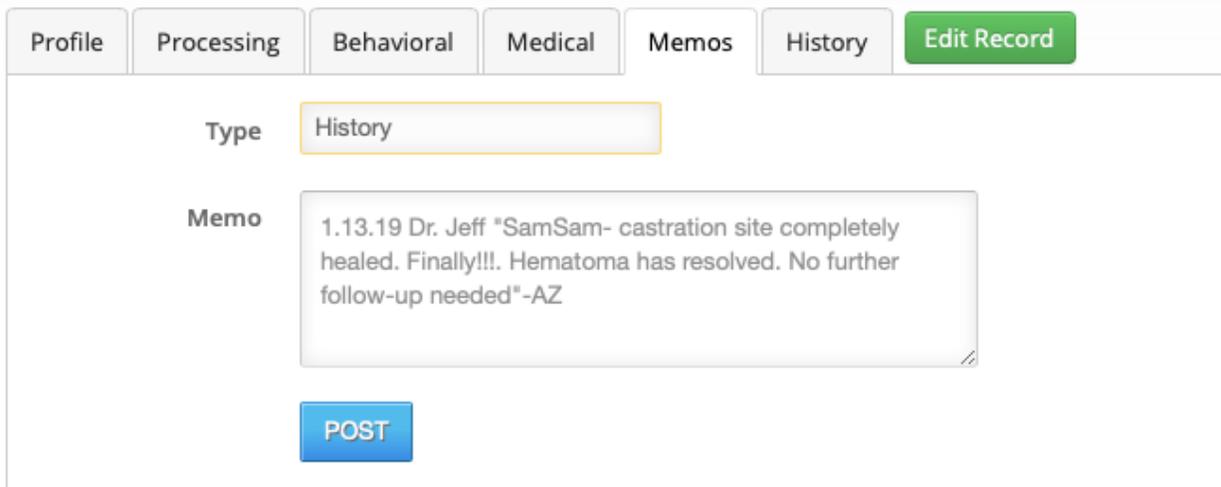
Color: **Brown/White**

5. Scroll to see if there is a memo whose type is **History**. (You will not be adding this as a stand alone medical memo.) You may see **Dog History from iShelter**. DON'T ADD THIS TO THAT MEMO. Those are historical and should not be touched. If you find an existing **History** memo, **go to step 7**. If you don't, don't panic. Just **go to step 6**.

11/20/2019	Medical	and play ball. No c/s/v/d/pu/pd. Normal appetite and energy Diet:	pom_bclinic	Edit	Remove
11/09/2019	Bio Notes	Name - First Name Laura Name - Last Name Colin Name - Suffix Email lauraecolin@gmail.com Enter details about your dog's bio notes.	pom_bvanloh	Edit	Remove
10/31/2019	Kennel Card / Web Site Memo	Breed: Medium Mixed Breed Age: 7 years Weight: 50 pounds Gender: Male	pom_bvanloh	Edit	Remove
10/26/2019	History	10.25.19 Allison "I tried to give you a call but I know you're most likely in a doctor's appointment. Here is the dog that is headed your way! Hopefully he is a good fit for you.	pom_azepp	Edit	Remove

6. Creating a History memo if there isn't one already:

- Paste your text that you copied from the clinic email into the **Memo** box and select **History** for the **Type**.
- Before the text you just pasted, type the date the memo was sent followed by the person who sent the update.
- Put quotation marks around the text you pasted.
- Put your initials at the end:



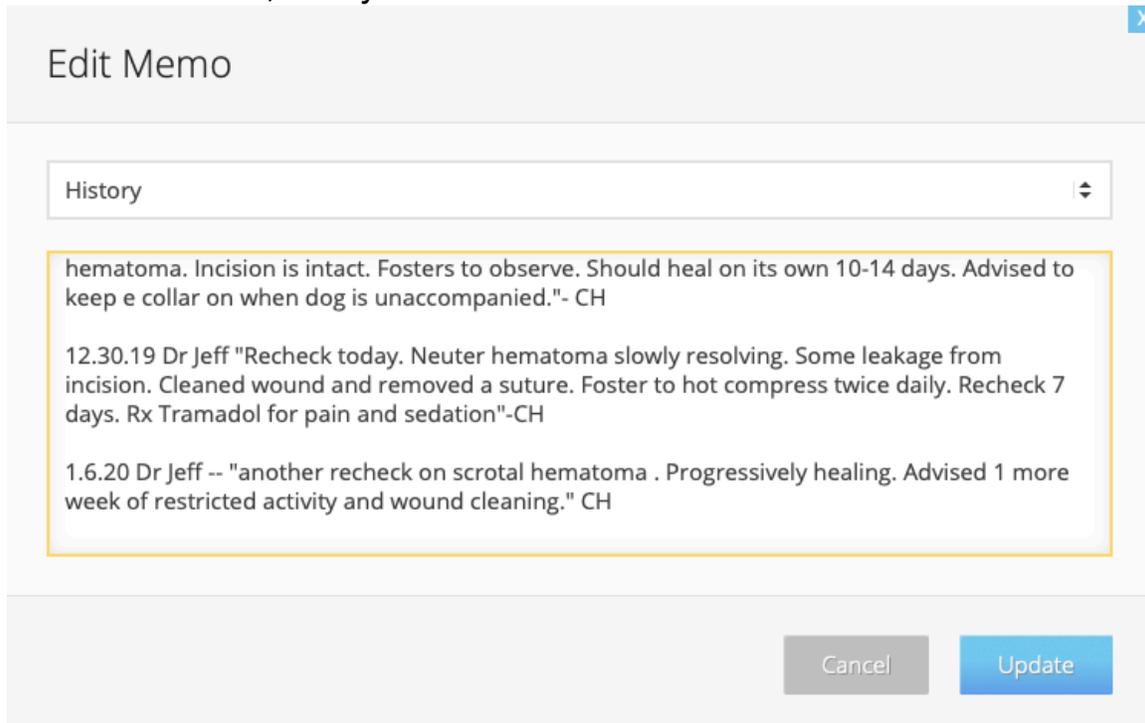
The screenshot shows a web interface with a navigation bar at the top containing tabs for Profile, Processing, Behavioral, Medical, Memos, History, and a green Edit Record button. Below the navigation bar, there is a form with a 'Type' dropdown menu set to 'History' and a 'Memo' text area containing the text: '1.13.19 Dr. Jeff "SamSam- castration site completely healed. Finally!!!. Hematoma has resolved. No further follow-up needed"-AZ'. A blue 'POST' button is located below the text area.

- Click **Post**

7. Adding to an existing History memo:

- Find the history memo (there should only be one)
- Click **Edit** to have access to all the internal notes on the selected dog.
- Scroll all the way to the bottom (these updates are chronological with the oldest being at the top).

- Enter the date, person who wrote the memo, the memo with quotation marks around it, and your initials:



The screenshot shows a web interface for editing a memo. At the top, there is a title bar that says "Edit Memo" with a close button (X) on the right. Below the title bar is a dropdown menu currently set to "History". The main content area contains three lines of text, each representing a medical note:

- hematoma. Incision is intact. Fosters to observe. Should heal on its own 10-14 days. Advised to keep e collar on when dog is unaccompanied."- CH
- 12.30.19 Dr Jeff "Recheck today. Neuter hematoma slowly resolving. Some leakage from incision. Cleaned wound and removed a suture. Foster to hot compress twice daily. Recheck 7 days. Rx Tramadol for pain and sedation"-CH
- 1.6.20 Dr Jeff -- "another recheck on scrotal hematoma . Progressively healing. Advised 1 more week of restricted activity and wound cleaning." CH

At the bottom right of the form, there are two buttons: a grey "Cancel" button and a blue "Update" button.

- Click the **Update** button.

Any conversation you have about this dog (with a foster, adopter, staff, clinic) should be added to this history memo too. Use the same format and include all responses.

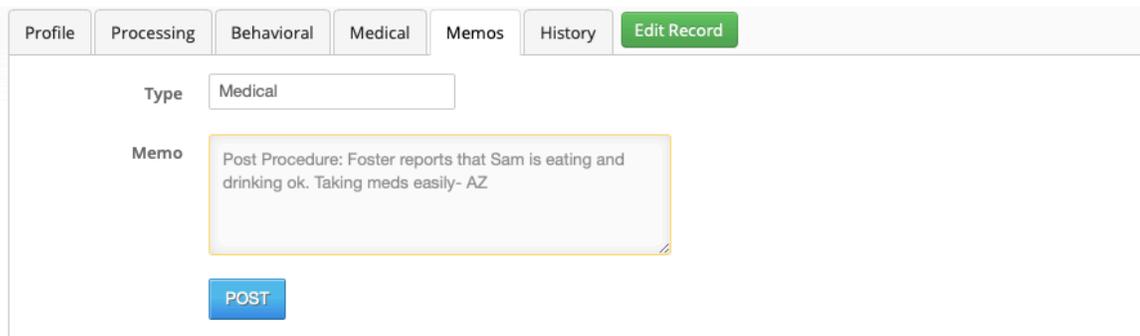
How and when to use medical memos

Medical memos are used primarily for the vet staff. They check these before a client comes in. They don't read the history memo, so you have to make sure that relevant medical info is in a medical memo. You add the post procedure check up responses from the follow up call as that is directly pertinent to the clinic staff. Those should be short and succinct.

template: Post Procedure F/U "Copy/Paste what the foster says"-Your Initials

example: Post Procedure F/U "Peppermint is eating and drinking fine after procedures. A little lethargic but not concerning"-AZ

If there is anything concerning, let the clinic know and see what they advise. The clinic staff don't consult this that frequently. If there are other medical issues that the vet should see when they come in, put it as a **Medical** memo AND in the **History** memo.



The screenshot shows a software interface for creating a medical memo. At the top, there is a navigation bar with tabs for Profile, Processing, Behavioral, Medical, Memos, History, and Edit Record. The 'Medical' tab is selected. Below the navigation bar, there is a form with a 'Type' field set to 'Medical' and a 'Memo' text area containing the text: 'Post Procedure: Foster reports that Sam is eating and drinking ok. Taking meds easily- AZ'. A blue 'POST' button is located below the text area.

How to add an attachment

Most documents about a dog are stored as attachments to the dog's Shelterluv record. This includes adoption contracts, bite clauses, etc. But there are a couple of categories of exceptions:

- Medical records from the POMDR Board Clinic are stored elsewhere in the dog's Shelterluv record, so they should not be added as attachments.
- LGL forms are stored in LGL in the records of the people who filled them out. (Intake Questionnaires are stored in both places: the originally submitted forms are stored in LGL, but annotated copies are uploaded to the dog's Shelterluv record.)

Here are instructions for storing a document as a Shelterluv attachment:

8. Make sure the document is in one of the allowed formats, which are: plain text (.txt), PDF, Word document (.doc or .docx), JPEG (.jpg or .jpeg), or PNG. If it is in some other format, convert it to one of those formats (on a Mac, anything that can be printed can be saved as a PDF by bringing up the Print dialog and using the PDF drop-down menu).
9. Save the document on your desktop and name it using this format:

[Dog name] [document type] - [originating clinic/shelter if applicable]
[most relevant date]

This file name will be the name of the attachment in Shelterluv. You can't edit the name once it has been uploaded. (If you make a mistake in the name, delete the uploaded file and then upload again with the corrected name.)

example document types: shelter records, Intake TAFS, labs, X-rays, annotated Intake Questionnaire, Guardian Surrender

example locations: SAS, MCAS, SPCA, SCCAS, Cottage, Steinbeck

example names:

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 with notes 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

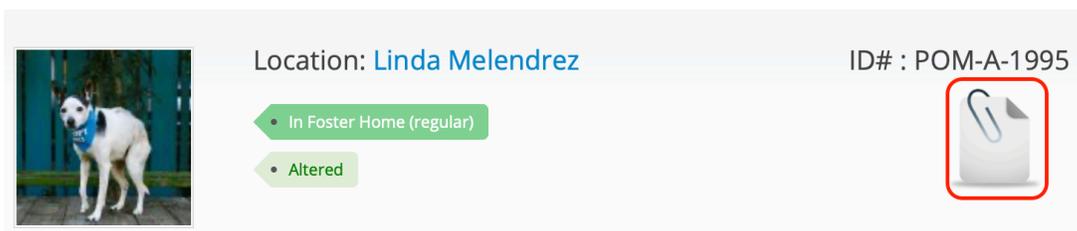
Cousteau Completed TAF - Steinbeck 9-8-19

Lula Xrays 2-1-20

Lula Glacier Peaks Allergy Test Results 10.26.19

10. Go to the dog's record in Shelterluv (you can follow the steps in the **How to find a dog's record** section of this document).

11. Click the paper-with-clip icon on the right side of the dog's profile (under their ID number)



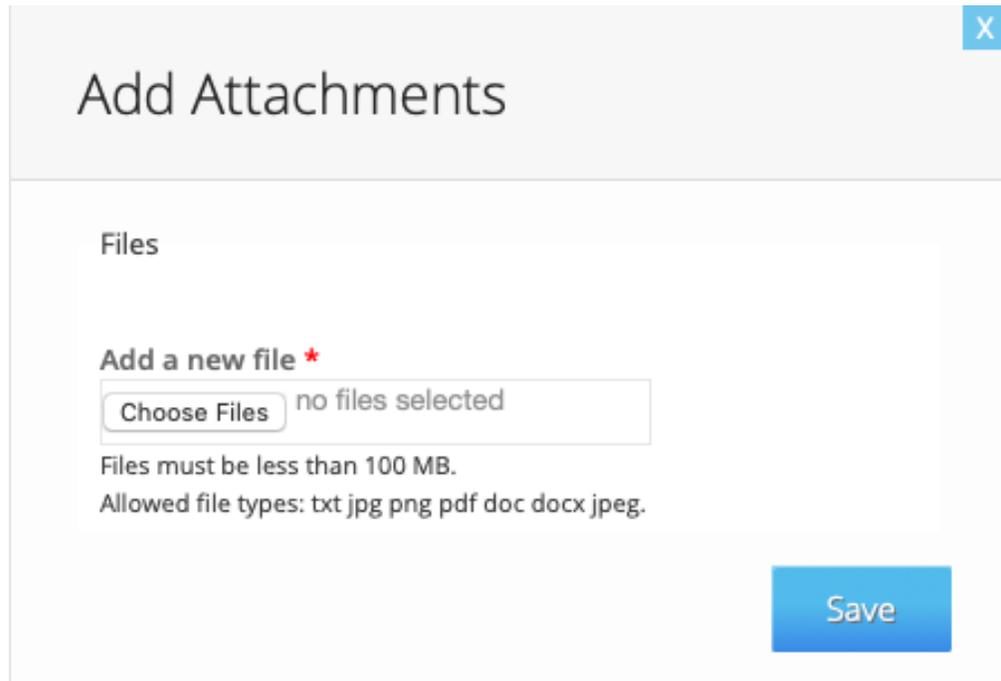
Location: [Linda Melendrez](#) ID# : POM-A-1995

- In Foster Home (regular)
- Altered



12. If other documents were previously uploaded, you will see them listed here. They are in chronological order from when they were uploaded.

13. Click **Add Attachment**, which will bring up the Add Attachments dialog box:



14. Either drag your file onto the **Choose Files** box, or click **Choose Files** and select your file from the dialog that comes up.

15. Click the blue **Save** button

16. If you are uploading multiple documents, you can repeat steps 6-8, or you can do multiple files at once in step 7.

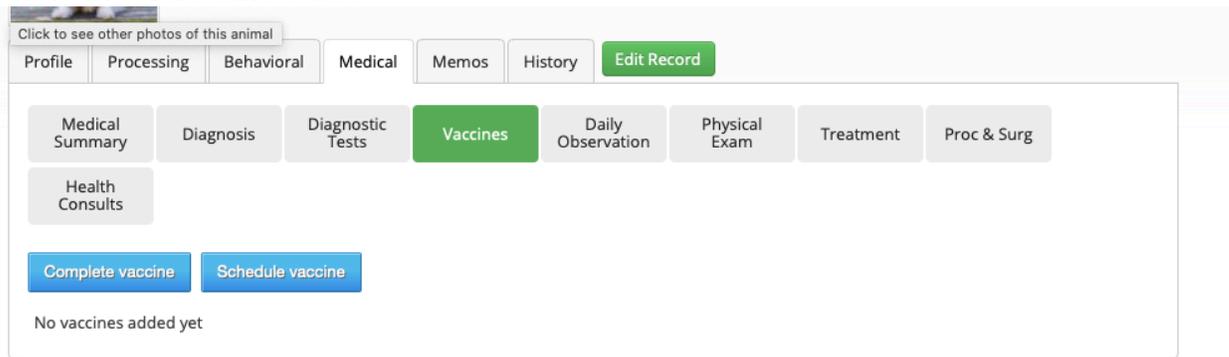
17. If you accidentally uploaded the wrong thing, just find the document you uploaded and click the x next to it to delete it.

How to enter vaccination info

Entering vaccination info helps us keep track of expired vaccines. When vaccinations are entered in Shelterluv, we can print them out to show proof in a much more professional way too.

Vaccine records can come in 3 different ways: from shelter records, from previous medical records or from the POMDR Board Clinic. All of these can be entered the same way.

1. Go to the dog's record in Shelterluv (you can follow the steps in the **How to find a dog's record** section of this document).
2. Click the **Medical** tab
3. Click the **Vaccines** tab



4. Click the blue **Complete vaccine** button. This brings up a dialog box, which starts like this:

A screenshot of a dialog box titled 'Complete vaccine'. It contains several input fields: 'Date *' with a calendar icon and the value '01/19/2020'; 'Quick fill' with a dropdown menu showing 'Select..'; 'Product *' with a dropdown menu showing 'Select..'; 'Type' with an empty text input field; and 'Manufacturer' with an empty text input field. There is a close button (X) in the top right corner.

5. Enter the date that the vaccine was given. It's important to do this before choosing from the **Quick fill** menu.
6. Click in the **Quick fill** drop down menu to see a list of vaccines:



7. Choose the right vaccine from this list, with these considerations:
 - If DHPP or Rabies was given, and we have proof that the dog also received an earlier dose of this same vaccine, then choose the “3-year” option. Otherwise choose the “1-year” option.
 - The first time Canine Influenza is given, choose the “First Time” option. All subsequent times choose “Booster and Annual”.
8. Most boxes will auto-populate for you when you select the vaccine from the **Quick Fill** list. Fill in the other boxes as follows:
 - **Lot #**: write the serial number. You will not always have this, but enter if you do. If you do not have the lot number, enter 0000.
 - **Product expiration date**: If you have the expiration date, enter it here, otherwise just enter the date the vaccine was given.
 - **Vaccinated by**: Enter the name of the vet who administered the vaccine, if known. Otherwise enter the name of the vet clinic (e.g. “Peace of Mind Dog Rescue Clinic”).
 - For Rabies vaccinations, enter “n/a” for **Rabies tag #**. If the vaccine was administered somewhere other than the POMDR Clinic, select **Another Vet** for the **Supervising veterinarian**.
9. Click blue **Save** button
10. Double-check that all info was entered correctly.

How to create a prescription

Only authorized people should create prescriptions.

1. Go to the dog's record in Shelterluv (you can follow the steps in the **How to find a dog's record** section of this document).
2. Click the **Medical** tab
3. Click the **Treatment** button



4. Click the blue **Schedule Treatment** button.



5. A “Schedule treatment” form will appear. Fill in at least all of the fields marked with red stars (those are the required fields), and click the blue **Save** button. The prescription will appear at the bottom of the page. If you're ready to print the label for the prescription, follow the steps in the section of this document called “**How to print a prescription label**”.

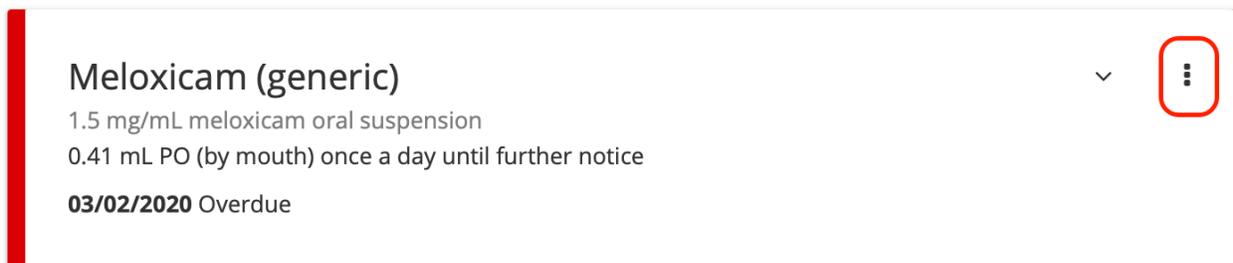
How to print a prescription label

Shelterluv allows you to print the little sticky labels that wrap around prescription bottles. For mysterious reasons (don't get me started), **this only works right in the Chrome browser**. So make sure you're using Chrome when you do these steps, or the text won't fit on the printed label.

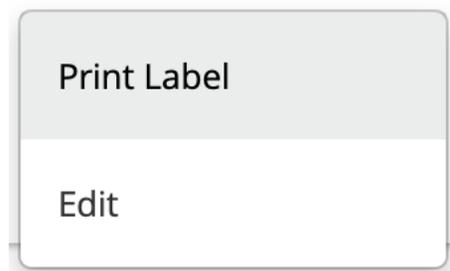
1. Go to the dog's record in Shelterluv (you can follow the steps in the **How to find a dog's record** section of this document).
2. Click the **Medical** tab
3. Click the **Treatment** button



4. Find the relevant prescription at the bottom of the page, after the **Treatment sheet**. If the relevant prescription doesn't exist yet, follow the steps in the section called "**How to create a prescription**" and then come back here to finish the printing steps.
5. Click the vertical ellipsis (three dots) on the right side of the relevant prescription to get a menu of options.



6. Choose **Print Label** from the menu of options.



7. A new window or tab will open that shows the label and also a small **Print Label** button. Click the **Print Label** button.

POMDR Board Clinic 1251 10th Street Monterey, CA 93940 Phone: E-mail: clinic@peaceofminddogrescue.org	Dr. Jeff Hogans Rx#100646 Refills left: 0 Fill date: 04/16/2020
BB POM-A-2027 Terrier, Rat, Dog	Peace of Mind Dog Rescue
Meloxicam (1.5 mg/mL meloxicam oral suspension) Quantity: 10 mL	Expires: 07/31/2021
Give 0.41 mL, by mouth, every 24 hours for 03/02/2020.	

Print Label

8. Some printer information will appear to the right of the label. If you don't see this printer information, maybe you're using some web browser other than Chrome? You have to use Chrome to print labels. Make sure the **Destination** is set to **DYMO LabelWriter 450**, then click the blue **Print** button.

POMDR Board Clinic 1251 10th Street Monterey, CA 93940 Phone: E-mail: clinic@peaceofminddogrescue.org	Dr. Tessa Fischer Rx#100662 Refills left: 0 Fill date: 04/16/2020
Note POM-A-2036 Dachshund, Standard Smooth Haired, Dog	Peace of Mind Dog Rescue
Meloxidyl (1.5 mg/mL meloxicam oral suspension) Quantity: 5.2 mL	Expires:
Give 0.52 mL, by mouth, every 24 hours for 10 days (04/07/2020 - 04/16/2020) .	

Print 1 sheet of paper

Destination  DYMO LabelWriter 450

Pages All

Copies 1

Layout Portrait

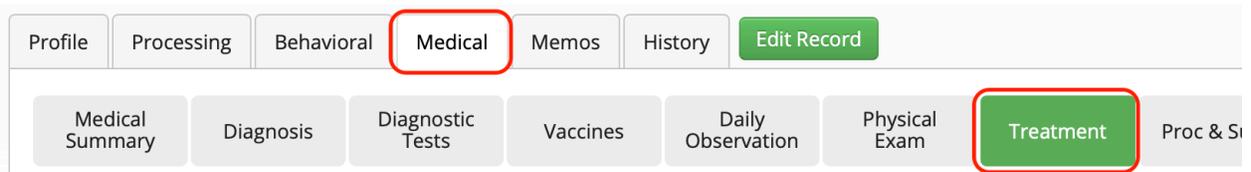
More settings

Cancel **Print**

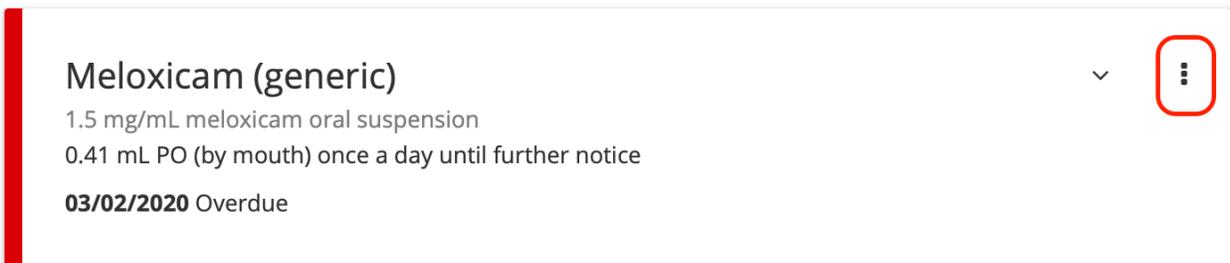
How to refill a prescription

These steps are for refilling a prescription that was previously created for this dog. To create a new prescription for this dog, follow the steps in the section of this document called “**How to create a prescription**”.

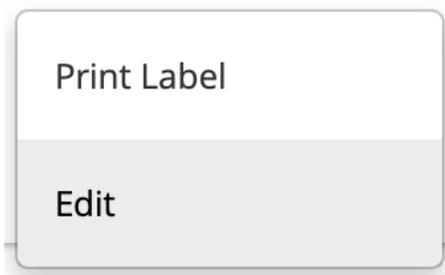
1. Go to the dog’s record in Shelterluv (you can follow the steps in the **How to find a dog’s record** section of this document).
2. Click the **Medical** tab
3. Click the **Treatment** button



4. Find the relevant prescription at the bottom of the page, after the **Treatment sheet**.
5. Click the vertical ellipsis (three dots) on the right side of the relevant prescription to get a menu of options.



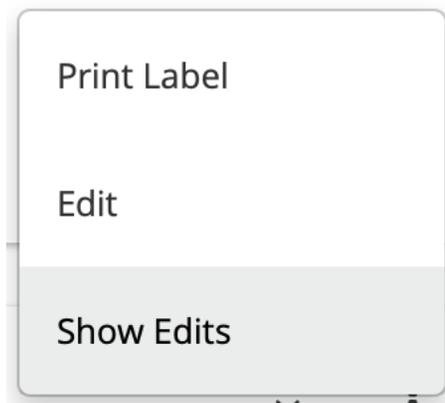
6. Choose **Edit** from the menu of options.



7. An “Edit treatment” form will appear. The form will show the previous values for this prescription. Change anything that needs changing, which is typically only the **Date due** and perhaps the **Amount in container**.
8. Click the blue **Update** button at the bottom of the form. The form is quite tall, so you’ll have to scroll down the page to find the **Update** button.
9. If you’re ready to print the refilled prescription label, follow the steps in the section of this document called “**How to print a prescription label**”.

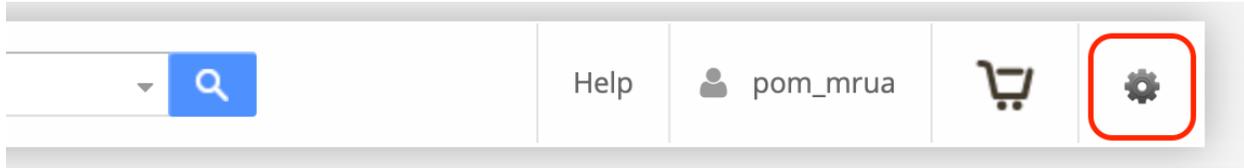
Note that you can see a history of all refills of a prescription, as follows:

1. Follow the steps above, through step 5.
2. Choose **Show Edits** from the menu of options. A little window will pop up that shows past refills.

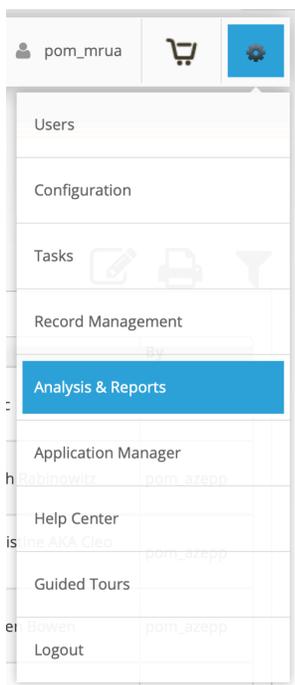


How to get a summary of recent intakes

1. Move the mouse over the gear icon in the top right of any page



2. Select **Analysis & Reports**



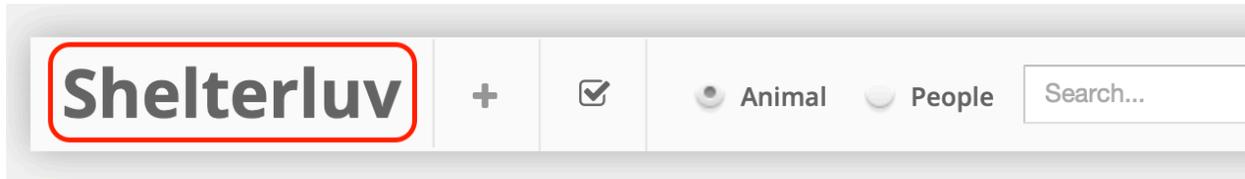
3. Adjust the **Begin Date** and **End Date** for **Animal Intake** as desired. We often look at one month of data at a time.

Animal Outcome	Outcomes by type	04/15/2020	04/15/2020	Run Report
Animal Intake	Intakes by type	04/15/2020	04/15/2020	Run Report
Physical Exams	Completed Physical Exams (SOAP notes)	04/15/2020	04/15/2020	Run Report

4. Click **Run Report** on the **Animal Intake** line. A spreadsheet of intake-related info is displayed. From here you can click the blue **Print** button if desired.

How to print a list of all currently fostered dogs

1. Click on the big “Shelterluv” text in the top-left of any page.



2. A list of dogs appears, ordered by intake date (most recent at top). But this isn't necessarily a complete list yet.

Intake	Picture	Species	Name	ID	Color	Breed	Status	Location	By
04/15/2020		Dog	Juniper	POM-A-2076	Cream	Kelpie, Australian	No Rescue Groups (from shelter)	Vet, Boand Clinic	pom_azepp
04/14/2020		Dog	Pennie	POM-A-2075	Brown	Chihuahua	No Rescue Groups (from foster)	Foster Care: Ruth Rabinowitz	pom_azepp
04/14/2020		Dog	Arlow	POM-A-2074	Cream	Chihuahua	No Rescue Groups (from foster)	Foster Care: Christine AKA Cleo Norlander	pom_azepp
04/13/2020		Dog	Theodore Pom	POM-A-2073	Red/Mahogany	Pomeranian	No Rescue Groups (from foster)	Foster Care: Karen Bowen	pom_azepp
04/11/2020		Dog	Triss	POM-A-2072	Black	Chihuahua	No Rescue Groups (from foster)	Foster Care: Patricia Naranjo	pom_amckee
04/07/2020		Dog	Santana	POM-A-2070	Apricot	Hound, Basset	No Rescue Groups	Foster Care: Mrean DeMuth	pom_azepp

3. Scroll down to the bottom of the page. A little “loading” indicator appears at the bottom left, and then more dogs will be added to the list.

<input type="checkbox"/>	02/13/2020		Dog	BB		POM-A-2021	Black		terrier, Rat
<input type="checkbox"/>	02/06/2020		Dog	Cinnamon Corgi		POM-A-2022	Apricot		Corgi, Pembroc

Loading..

4. Repeat step 3 until the “loading” indicator no longer appears.
5. Now the list is complete. You can now print like you would with any browser page: **File** -> **Print** from the menu bar, or Command-P.

How to print a Kennel Card

1. Go to the dog's record in Shelterluv (you can follow the steps in the **How to find a dog's record** section of this document).
2. Click the paper-with-clip icon on the right side of the dog's profile (under their ID number)



3. After the **Attachments** section you will find the **System Generated Documents** section.

Attachments		✉ Email attachments	
Pita Shelter Records MCAS Rabies exp.3.27.2021.pdf	↓	✕	
Pita Intake TAF 3.27.2020.pdf	↓	✕	
Add Attachment			
System Generated Documents			
Kennel Card	🖨	✉	
Complete Medical History	🖨	✉	
Treatment Sheet History	🖨	✉	
Memos	🖨	✉	

4. Click the printer icon next to **Kennel Card** (or click the email icon if you want to email it instead). See also the section called “**How to print, share, and send medical records**”.

How to print, share, and send medical records

1. Go to the dog's record in Shelterluv (you can follow the steps in the **How to find a dog's record** section of this document).
2. Click the paperclip-on-page icon on the right side of the page, beneath the dog's ID number.



Location: [John Forsht](#)

• No Rescue Groups (from foster)

ID# : POM-A-2065



You will see a list of **Attachments** (files, typically medical info, that were previously attached to this dog's record) followed by a list of **System Generated Documents**. The rest of this section describes some of the various ways you can export this information.

Attachments	Email attachments	
CHVC_COMPLETED INTAKE TAF APRIL 25 2019.pdf		
CHVC_TAF FOR WORMS IN STOOL MAY 30 2019.pdf		
SAS KENNEL CARD AND MEDICAL HISTORY.pdf		

System Generated Documents		
Kennel Card		
Complete Medical History		
Treatment Sheet History		
Memos		

To print an attachment:

Click on the teal-colored attachment name, and the file will open in a new window. From there you can choose **Print** from the Mac's **File** menu (or just type Command-P).

Attachments	✉ Email attachments	
CHVC_COMPLETED INTAKE TAF APRIL 25 2019.pdf		
CHVC_TAF FOR WORMS IN STOOL MAY 30 2019.pdf		
SAS KENNEL CARD AND MEDICAL HISTORY.pdf		

To print a Kennel Card or Complete Medical History from the POMDR Board Clinic:

In the list of **System Generated Documents**, click on the printer icon to the right of **Complete Medical History**.

System Generated Documents		
Kennel Card		
Complete Medical History		

This will show the medical history in a new window. From there you can choose **Print** from the Mac's **File** menu (or just type Command-P). Note that this is the medical history from the POMDR Board clinic only. Medical history from other clinics will be stored as attachments. Also note that we don't use the item called **Treatment Sheet History**.

To share a single attachment in email:

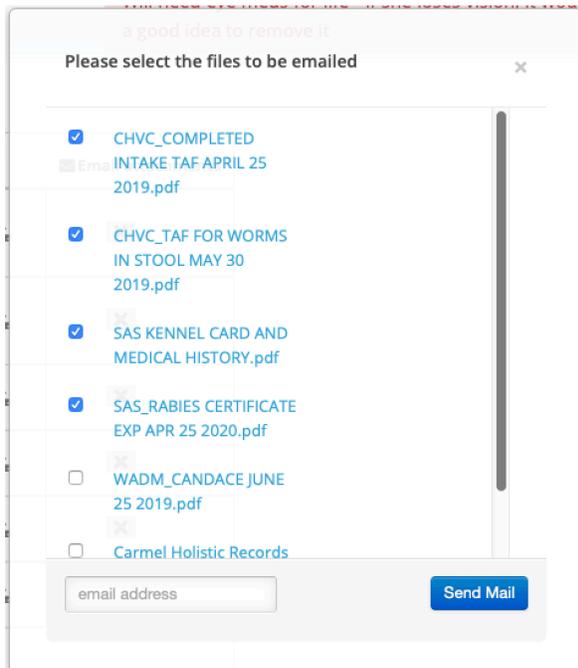
In the Mail program, create a new message. Then you can press-and-drag from the teal-colored attachment name to the Mail message window. This will put a link to the attachment in the Mail message. The email recipient can click this link to see the attachment's details (which they could then print if desired). You can do this repeatedly to share multiple attachments in the same email.

To share multiple attachments in email at once:

Click the Email attachments “button” in the top-right of the gray header of the **Attachments** list:



This will bring up a window with a checkbox next to each attachment's name:



Check the ones you want to send. Type an email address in the text field at the bottom of the window, and then press the blue **Send Mail** button.

To share a Complete Medical History or other System Generated Document in email:

Click the Email icon next to the name of the System Generated Document you want to share:

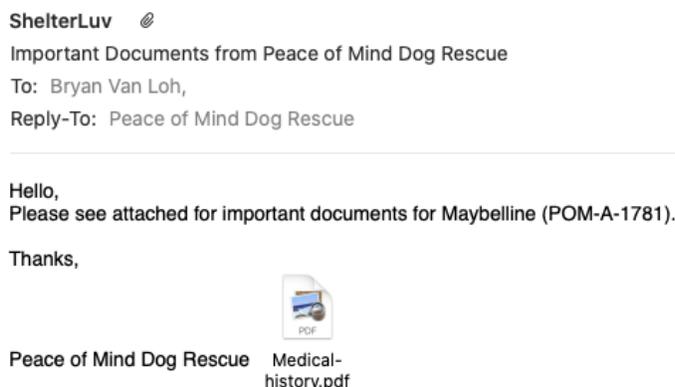
System Generated Documents		
Kennel Card		
Complete Medical History		

This will bring up a little window asking for an email address:

Please enter an email address to send the Medical history details to : ×

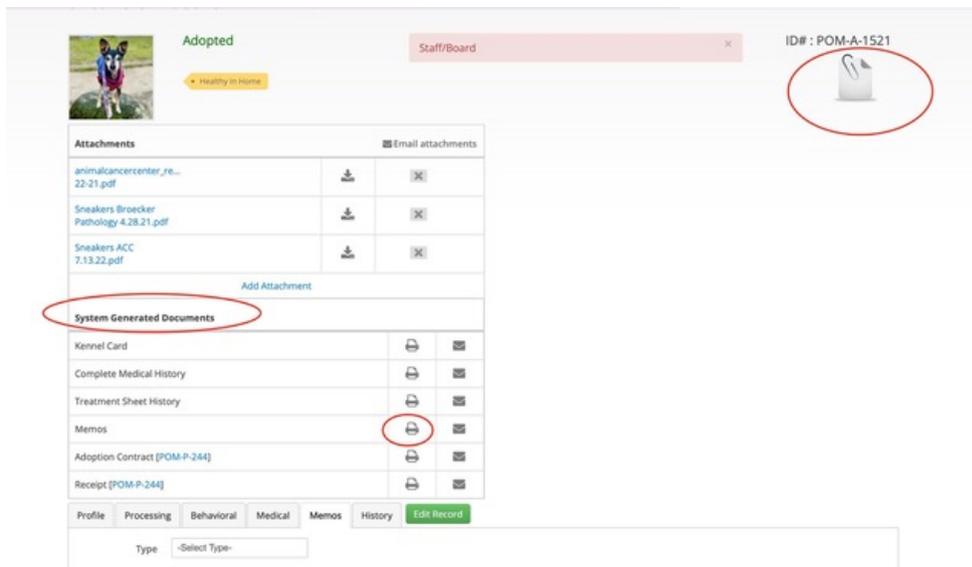
Send Mail

You could just enter the recipient's email address here and click **Send Mail**. However, this is usually not the best choice, because the email that gets sent is pretty generic. So typically you should instead enter your own email address here. Then you will receive the generic email. From that email you can copy the document and paste it into an email to the desired recipient, typically as part of a longer conversation. Here's what the initial email looks like:



How to print (or just read) behavioral memos

1. From the dog's record, click on the paperclip icon, look under **System Generated Documents**, and click on the printer icon across from **Memos**. You might have to scroll past a bunch of attachments before you get to the System Generated Documents section.



2. The types of memos will be sorted in alphabetical order (e.g., **Behavioral** before **Medical**). Within each type the memos will be from newest to oldest. Just print the pages you need or read the reports you need to read.

Memos



Animal
Sneakers Broecker (POM-A-1521)
Pinscher, Miniature Dog
Primary color:Black Secondary color:Tan
Neutered Male
13 years, 6 months, 6 days old (DOB:
04/23/2009)

Owner
Carie Broecker
(831) 601-4253
carie@peaceofminddogrescue.org
125-4th Street
Pacific Grove, CA 93950

Behavioral

10/29/2022 by Carie Broecker
Still cute and funny.

09/22/2022 by Carie Broecker
Very good boy with a silly tongue. Wash his face after he eats.

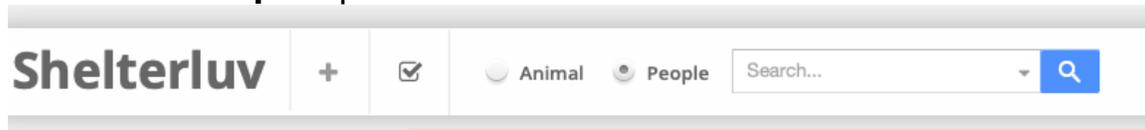
09/22/2022 by Carie Broecker
Very good boy. Plan is to throw his ball for him.

09/22/2022 by Carie Broecker
A Very good boy. Plan is to keep petting him a lot.

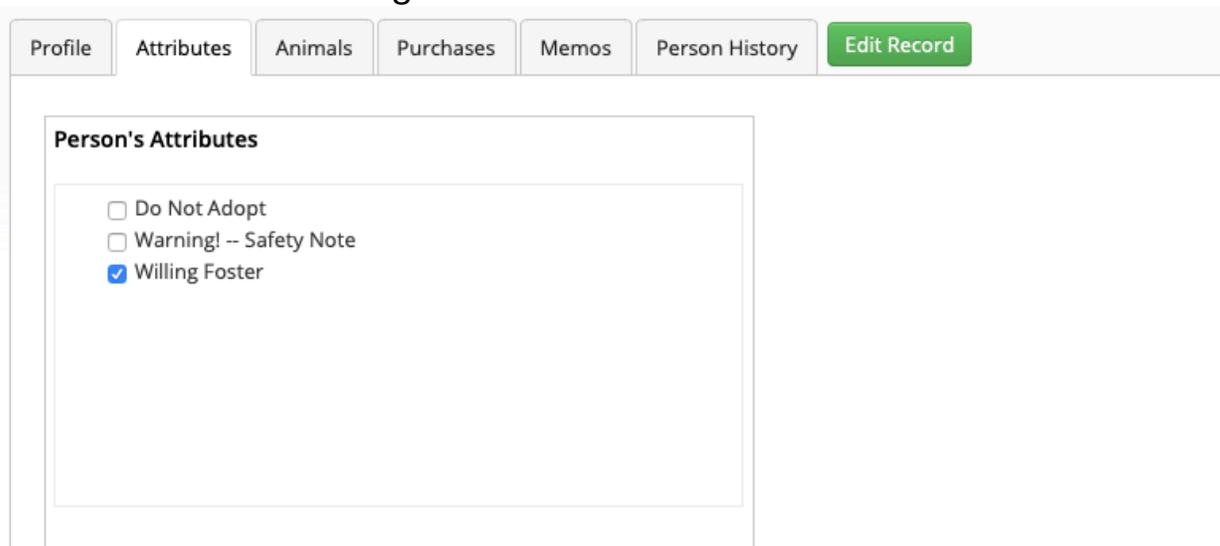
How to process moving a dog to its initial foster home

These instructions are for processing a dog being moved to its initial foster home. If a dog is already in a foster home and moving to a different foster home, follow the instructions in the section titled **How to process moving a dog from one foster home to another**.

1. Select the **People** option next to the search bar

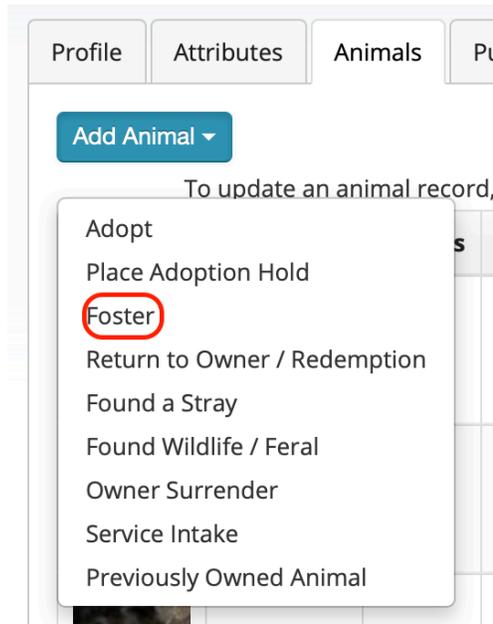


2. Search for the name of the foster person.
3. If the person appears in the search results, select them. If the person is not there, follow the steps in the **How to add a person** section of this document to add them. If the dog will be fostered by an organization (e.g. Dawg Gone It), use the name of the person at that business who is the primary contact for the dog (e.g. Stephanie Sleckman). This should leave you on the person's profile page.
4. Select the **Attributes** tab and make sure **Willing Foster** is checked. This will cause the person to show up as a possible foster when you record the location change.



5. Select the **Animals** tab

6. Click **Add Animal** and select **Foster** from the dropdown list



7. This will bring up a page listing all the dogs currently in POMDR's care. The dogs that are located at the clinic (that is, the dogs without a current foster home) will have a green **Foster** button on the far right side:

Photo	Date	Species	Name	Breed	Color	ID	Status	By	
	01/13/2020	Dog	Tyga	Corgi, Cardigan Welsh	Black	POM-A-1996	No Rescue Groups (from shelter)	pom_azepp	Foster
	01/11/2020	Dog	Ralfie	Pomeranian	Black	POM-A-1974	Pending Adoption (from shelter)	pom_amckee	Foster

8. Locate the dog in question, and check what it says in the **Status** column. You will use this in the next step.

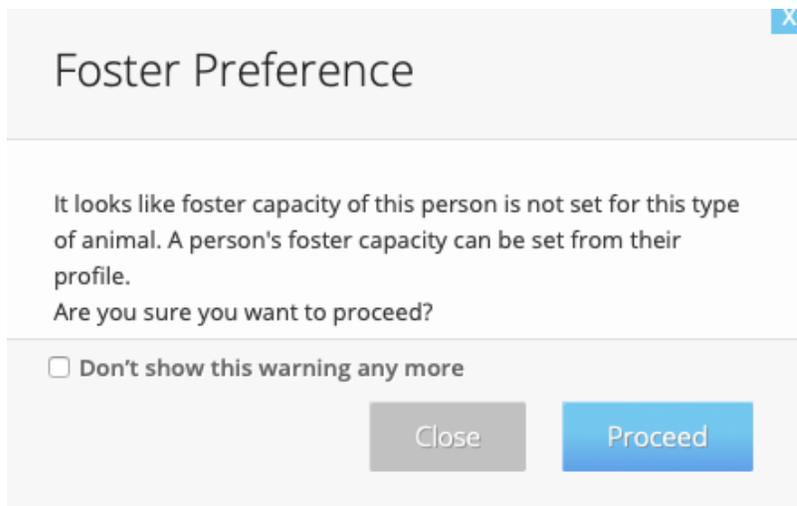
9. Click **Foster** and select the appropriate status for them, with the following considerations:

- If you know the dog is a hospice dog, then choose **Hospice**.
- Otherwise, if the status was **No Rescue Groups (from shelter)** then choose **No Rescue Groups (from foster)**. These statuses are used for dogs that shouldn't be published online (yet), typically because good photos aren't yet available but occasionally for other reasons. The

Adoptions Coordinator will update that when they publish the dog online.

- Otherwise, if the status was something else and there isn't a high-quality photo of the dog then choose **No Rescue Groups (from foster)**.
- Otherwise, choose **In Foster Home (regular)**, unless you have a specific reason to use one of the other foster statuses.

10.If the following notice comes up, click **Proceed**. (You can first check **Don't show this warning any more** too. That will stop this window from showing up any more for this person, though it might still show up for other people.)



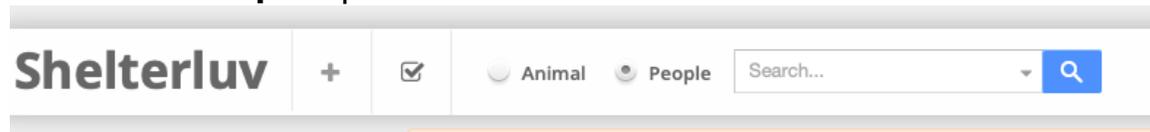
11.Click the gray **Complete Foster** button.

12.To ensure that these steps worked properly, go to the dog's profile page and make sure the correct foster name appears next to the dog's photo.

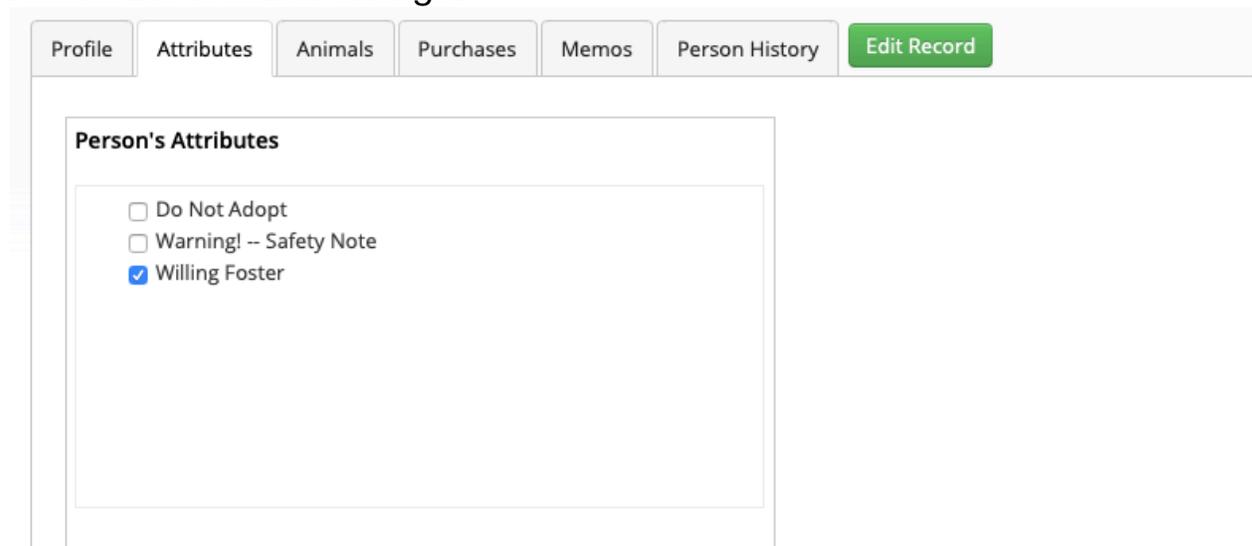
How to process moving a dog from one foster home to another

These instructions are for processing a dog being moved from one foster home to another. If a dog is being sent to its initial foster home, follow the instructions in the section titled **How to process moving a dog to its initial foster home**.

1. Select the **People** option next to the search bar



2. Search for the name of the new foster person.
3. If the person appears in the search results, select them. If the person is not there, follow the steps in the **How to add a person** section of this document to add them. This should leave you on the person's profile page.
4. Select the **Attributes** tab and make sure **Willing Foster** is checked. This will cause the person to show up as a possible foster when you record the location change.



5. Search for the name of the current foster in the people search bar
6. Click their name (they will already be in Shelterluv with an account.)
7. Click the **Animals** tab

- You will see a list of dogs associated with this person. Each of their current foster dogs will be included, with a green **Select** button on the right. Click **Select** for the dog in question.

To update an animal record, select it from the list below. If you don't see it, add it with the button at left.

Photo	Date	Species	Name	Breed	Color	Animal ID	Event	By	Action
	12/03/2019	Dog	Squinty	Collie, Border	Black/White	POM-A-1938	Foster Returned	pom_bvanloh	
	10/25/2019	Dog	Squinty	Collie, Border	Black/White	POM-A-1938	Foster	pom_azepp	
	10/25/2019	Dog	Letty	Collie, Border	Black/White	POM-A-1935	Foster	pom_azepp	Select

- If you don't know the Shelterluv status of the dog in question, click the dog's name to visit the dog's profile page. On the right of the picture will be a green tag with the status (usually either **In Foster Home (regular)** or **No Rescue Groups (from foster)**). Remember this status because you'll need it in a few steps. Now click your browser's Back button to return to the list of dogs as shown in step 8.

10. Choose **Return Foster**

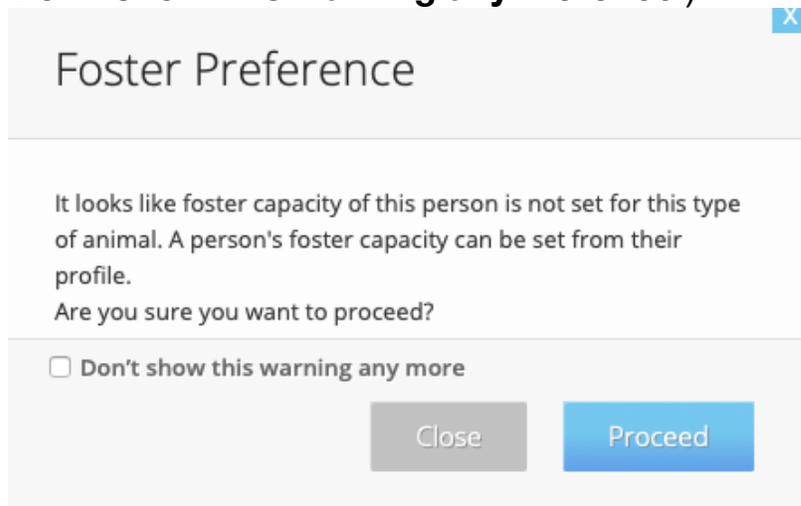
11. Click **Complete Foster Return**. This will take you to a form to fill out.

Photo	Date	Species	Name	Breed	Color	Animal ID	Event	By	Action
	12/03/2019	Dog	Squinty	Collie, Border	Black/White	POM-A-1938	Foster Returned	pom_bvanloh	
	10/25/2019	Dog	Squinty	Collie, Border	Black/White	POM-A-1938	Foster	pom_azepp	
	10/25/2019	Dog	Letty	Collie, Border	Black/White	POM-A-1935	Foster	pom_azepp	Complete Foster Return

- Fill in the date returned. If you're filling this out in advance, you'll have to use today's date, because Shelterluv won't let you use a future date here.

13. Under **Intake into** choose **Foster**

14. Under **Foster Parent** start typing the new foster's name. Choose their complete name from the list that pops up below where you are typing. (It will appear in this list if **Willing Foster** was checked back in step 4.)
15. Under **Current Foster**, select the appropriate status, with the following considerations:
- If the previous status (as noted in step 9) was **In Foster Home (from foster)** and the new foster home will have the dog for a limited, predefined time, then choose status **In Foster Home (temp)**.
 - Otherwise, if the previous status was **In Foster Home (temp)** and the new foster home will have the dog indefinitely, then choose status **In Foster Home (from foster)**.
 - Otherwise, use the same status that you noted in step 9, unless you have a specific reason to use one of the other statuses.
16. If the following notice comes up, click **Proceed**. (You can first check **Don't show this warning any more** too.)



17. Click **Finish**.

How to process moving a dog from a foster home to the clinic

Sometimes a dog is sent to the POMDR Board Clinic or another veterinarian's office for more than two days. Follow these steps to record that kind of move.

1. Search for the name of the current foster in the people search bar
2. Click their name (they will already be in Shelterluv with an account.)
3. Click the **Animals** tab
4. You will see a list of dogs associated with this person. Each of their current foster dogs will be included, with a green **Select** button on the right. Click **Select** for the dog in question.

To update an animal record, select it from the list below. If you don't see it, add it with the button at left.

Photo	Date	Species	Name	Breed	Color	Animal ID	Event	By	Action
	12/03/2019	Dog	Squinty	Collie, Border	Black/White	POM-A-1938	Foster Returned	pom_bvanloh	
	10/25/2019	Dog	Squinty	Collie, Border	Black/White	POM-A-1938	Foster	pom_azepp	
	10/25/2019	Dog	Letty	Collie, Border	Black/White	POM-A-1935	Foster	pom_azepp	Select

5. Choose **Return Foster**
6. Click **Complete Foster Return**. This will take you to a form to fill out.

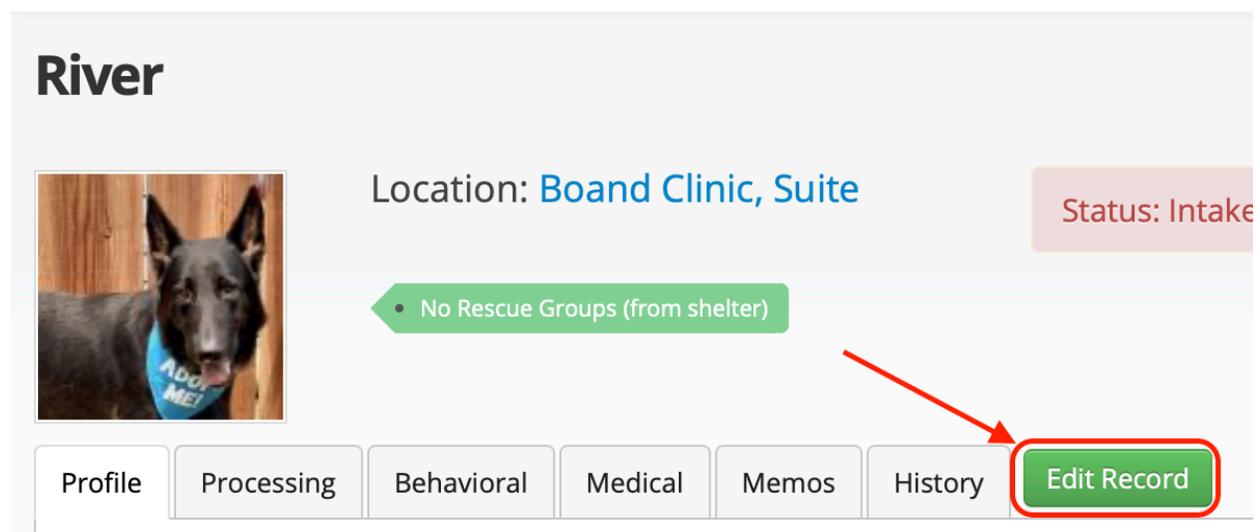
Photo	Date	Species	Name	Breed	Color	Animal ID	Event	By	Action
	12/03/2019	Dog	Squinty	Collie, Border	Black/White	POM-A-1938	Foster Returned	pom_bvanloh	
	10/25/2019	Dog	Squinty	Collie, Border	Black/White	POM-A-1938	Foster	pom_azepp	
	10/25/2019	Dog	Letty	Collie, Border	Black/White	POM-A-1935	Foster	pom_azepp	Complete Foster Return

7. Fill in the date closest to when the dog did/will go to the clinic. (If the date is in the future, you need to use today's date, because Shelterluv won't let you enter a future date here.)
8. Under **Intake into** choose **Shelter**
9. Under **Returned to** location, choose **Boand Clinic**.
10. A new choice will appear beneath **Boand Clinic**, labeled **—Select—**.
Click here and choose **Suite** or **Wall Kennel / Wire Cage**, whichever is appropriate for this dog.
11. Under **Status Upon Return**, make an appropriate choice
12. Click **Finish**.

How to process changing a dog's location when no foster home is involved

Use the following steps when a dog is moved from one location to another without any official foster home being involved. For example, a dog might move from a suite in the Board Clinic to a prospective adopter's home, before it is officially adopted. It is important to reflect these moves in Shelterluv so we can keep track of where each dog is at all times.

1. Start by going to the dog's Profile, either by searching for the dog's name or by following a link elsewhere.
2. Click the green **Edit Record** button.



River

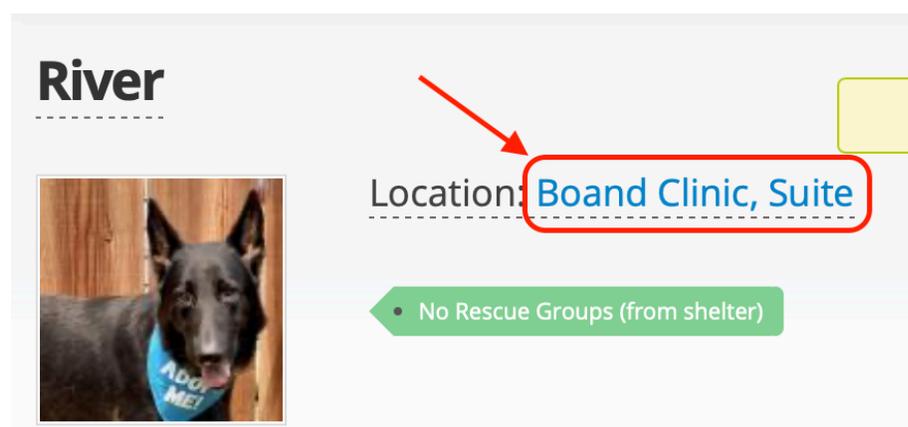
Location: Boand Clinic, Suite Status: Intake

• No Rescue Groups (from shelter)

Profile Processing Behavioral Medical Memos History **Edit Record**

A screenshot of a dog's profile page. The dog's name is 'River'. The location is 'Boand Clinic, Suite' and the status is 'Intake'. There is a green button that says 'No Rescue Groups (from shelter)'. At the bottom, there is a navigation bar with buttons for 'Profile', 'Processing', 'Behavioral', 'Medical', 'Memos', 'History', and 'Edit Record'. The 'Edit Record' button is highlighted with a red box and a red arrow points to it from the right.

3. Click on the location, displayed near the top of the page, which is now underlined.



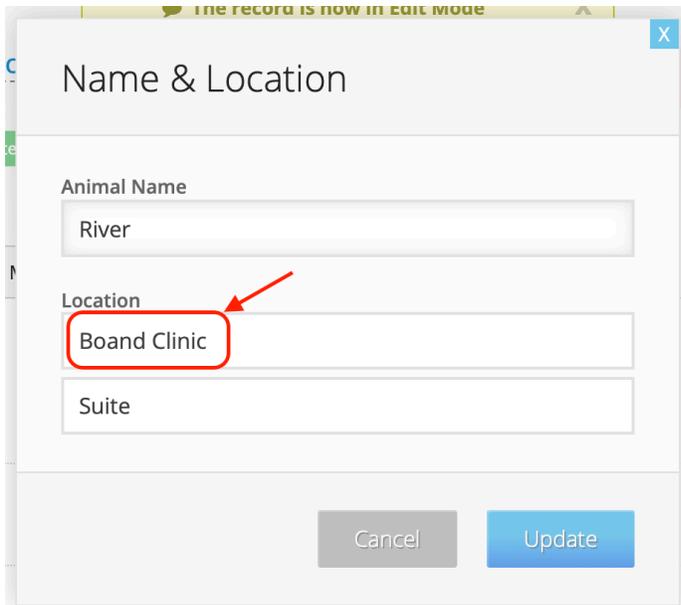
River

Location: Boand Clinic, Suite

• No Rescue Groups (from shelter)

A screenshot of the same dog's profile page. The location 'Boand Clinic, Suite' is now underlined and highlighted with a red box. A red arrow points to the underlined text from the top left.

- Click on the text under the word **Location** to and choose one of the top-level locations. The choices are **Boand Clinic**, **Boarding**, **Vet**, **With Previous Owner**, and **With Prospective Adopter**



The record is now in edit mode

Name & Location

Animal Name

River

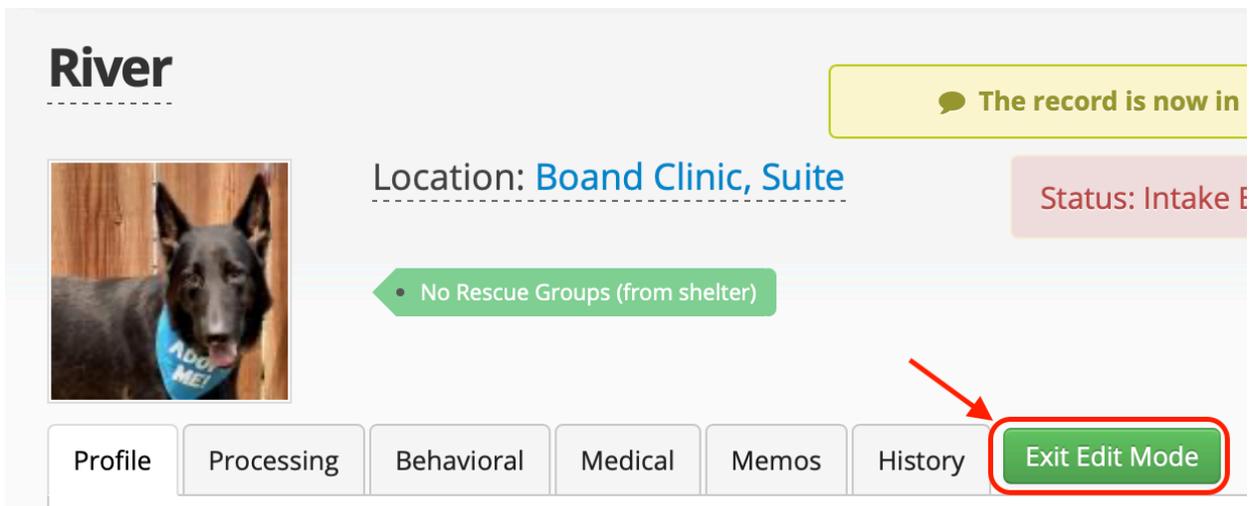
Location

Boand Clinic

Suite

Cancel Update

- If the location you just selected has sublocations, the word **—Select—** will appear. Click on that word to choose the appropriate sublocation.
- Click the blue **Update** button.
- Click the green **Exit Edit Mode** button.



River

The record is now in edit mode

Location: Boand Clinic, Suite

Status: Intake E

No Rescue Groups (from shelter)

Profile Processing Behavioral Medical Memos History **Exit Edit Mode**

How to process returning a dog to their owner

Use these steps for the case that an owner surrenders their dog to POMDR, but then for some reason changes their mind and wants their dog returned (before it has been adopted to someone else).

1. Start by searching for the name of the original owner to whom the dog is being returned.
2. In the search results, click the teal **Add** button on the right side:

Person Search Results

[Add New+](#)

show exact spelling matches only

Date Added	Name, Associated Name	Address	Phone	Action
11/15/2019	Jean Hontalas			Add

- Adopt
- Place Adoption Hold
- Foster
- Return to Owner / Redemption**
- Found a Stray
- Found Wildlife / Feral
- Owner Surrender
- Service Intake
- Previously Owned Animal

3. Choose **Return to Owner / Redemption**. This will bring up a list of dogs:

Shelter Inventory List

Search...

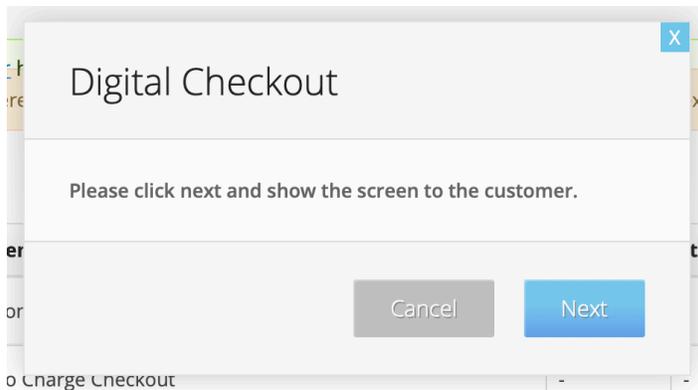
Filter by: Status Location

Photo	Last Edit	Species	Name	Breed	Color	ID	Status	By	
	11/06/2019	Dog	Rosemarie	Chihuahua	Brown	POM-A-444	In Foster Home (regular)	pom_importer	Return to Owner
	11/12/2019	Dog	Dixie aka Pixie	Cockapoo	Cream	POM-A-598	In Foster Home (regular)	pom_importer	Return to Owner
	12/14/2019	Dog	Corky aka Mr. Wilson	Corgi, Cardigan Welsh	Tan	POM-A-787	In Foster Home (regular)	pom_importer	Return to Owner
	12/13/2019	Dog	Matilda aka Molly	Terrier, Jack Russell	White	POM-A-1360	In Foster Home (regular)	pom_importer	Return to Owner
	10/04/2019	Dog	Harold	Chihuahua	Tan	POM-A-1401	In Foster Home (regular)	pom_importer	Return to Owner
	12/11/2019	Dog	Zoe aka Rosie	Dachshund	Tan	POM-A-1413	In Foster Home (regular)	pom_importer	Return to Owner

- Find the dog in question by scrolling or searching in this list, then click the green **Return to Owner** button.

	02/21/2020	Dog	Bella Boxer	Boxer	Brindle	POM-A-1851	In Foster Home (regular)	pom_importer	Return to Owner
	03/06/2020	Dog	Bella Yorkie	Terrier Yorkie/ Yorkie	Brindle	POM-A-1852	In Foster Home (regular)	pom_importer	Return to Owner

- Choose either **Never Became a POMDR dog** or **Owner able to take back**, depending on whether the dog officially became a POMDR dog.
- At this point you might get a series of “check-out” screens. If so, just click the **Next** button on each one until there are no more.



Redemption Agreement

Animal Information

Animal ID: POM-A-2114	Name: Bella Ciao	Type: Dog	Sex: Female
Weight: 16 lbs	DOB: 03-15-2005	Breed(s): Terrier/Poodle, Miniature	Altered: Yes
Chip#:	Current Age: 15Y / 2M	Colors: Red/Mahogany/ None	Size: Small (1-19)lbs
Microchipper:	Age Group: Senior Dog (7+years)	Pattern: None	

Agreement

I certify that the above animal I am claiming is mine and I have produced current rabies information to release the animal from this shelter.

Go Back
Next

If you see this signature screen, check the checkbox so that you can get past it.

Please sign in the box below.

[Clear signature](#)

* I have read and agree to the [Terms and Conditions](#)

Go Back Next

Digital Checkout

You're all set! Please show the screen to staffer to complete checkout

Go Back Next

7. You are done! If you go to the dog's page now, it should say Redeemed next to the dog's photo:

Redeemed

• Healthy In Home

ProfileProcessingBehavioralMedicalMemosHistoryEdit Record

Species: **Dog**

Breed: **Dachshund**

Pattern: **None**

Sex: **Male**

Adoption Price Group: **Dog Fee 4 (\$305.00)**

Color: **Black/Brown**

Distinguishing Marks:

Size Group: **Small (1-19)**

How to change a dog from Helping Paw Pre-intake to POMDR dog

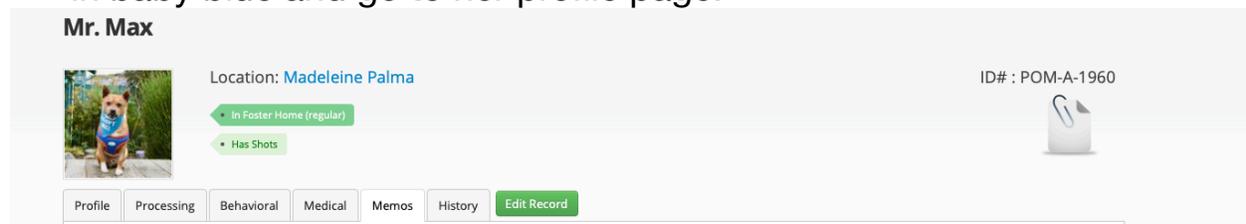
Every once in a while you might be partway through intaking a dog as a Helping Paw dog when its status changes and you want to make it a regular POMDR dog instead. Here's what to do.

1. Follow the steps for **How to process medical care payments**, choosing the item named **No Charge Checkout**. This will clear the pre-intake state.
2. Now follow the steps for **How to intake a dog that was surrendered by their guardian** to make the dog a POMDR dog.

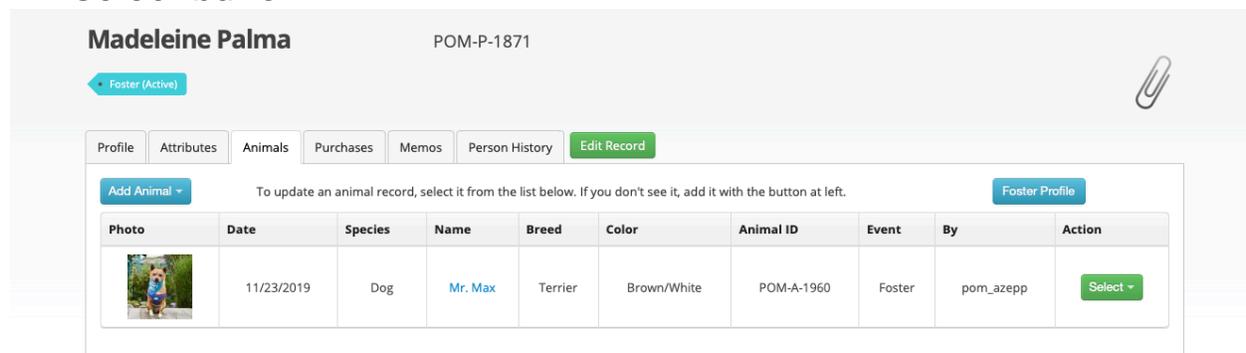
How to mark a dog as Adoption Pending

The **Adoption Pending** status is used for dogs that have been transferred from a foster home to the prospective adopter's home, but the adoption has not yet been finalized. The steps below are used for that case, and some of the steps are used for the case where the dog has not yet been moved to the prospective adopter's home.

1. Find the dog in Shelterluv and go to their profile page.
2. If the dog has not yet been moved to the prospective adopter's home, click on the **Processing** tab and change the **Current Status** to "**No Rescue Groups (from foster)**", so the dog will stop appearing on other rescue groups. Then **skip to step 12**. Otherwise continue to step 3.
3. Click on the foster's name directly from the dog's page. In this example we are marking Mr. Max adoption pending, so I click on Maddie Palma in baby blue and go to her profile page.



4. Once at her account, I click on the **Animals** tab and it should show her fosters and adopted dogs. Mr. Max is there and we click on the green **Select** button.



5. Click on **Return Foster**

6. Click on **Complete Foster Return**. This brings up a Confirm Foster Return page, as shown below.

Confirm Foster Return

Return
Mr. Max

Date Returned *
12/20/2019

Intake into
Shelter

Returned to location *
With Prospective Adopter

Status Upon Return * [Why this list?](#)
Pending Adoption (from shelter)

Memo

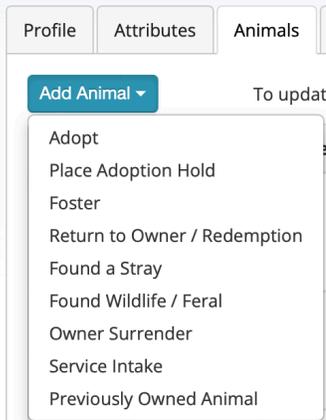
Finish

7. Enter the date on which the foster was returned.
8. Leave **Intake into** set to **Shelter**.
9. Set **Returned to location** to **With Prospective Adopter**.
10. Set **Status Upon Return** to **Pending Adoption (from shelter)**.
11. Click **Finish**, which will return to the dog's profile page.
12. Click the **Memos** tab.
13. Add a memo with this template: "Pending adoption with [adopter name] as of [date]". For example "Pending adoption with Carrie Nikitin as of 12/21/19". Set the memo type to **Pop-up**. If the dog hasn't moved to the prospective adopter's home yet, use the date that the dog is expected to move (if known).
14. Check whether the adopter already has a Shelterluv account. If not, add one, following the "**How to add a person**" steps elsewhere in this document.

How to place a dog on Adoption Hold

We use Shelterluv’s Adoption Hold mechanism for the case when a prospective adopter takes the dog home but has not yet formally adopted it (including not yet paid).

1. Make sure the potential adopter already has a record in Shelterluv, or add one (see **How to add a person** section).
2. Go to the Shelterluv page for the new adopter (maybe you just created it in step 1; otherwise find it by searching for the person’s name).
3. Click the **Animals** tab (3rd from the left).
4. Click the teal **Add Animal** button, which will bring down more options:



5. Click **Place Adoption Hold**. This will bring up a list of all dogs upon which an adoption hold can be placed.
6. Find the dog of choice by searching for their name. At the right side of the entry for this dog will be green **Hold** button. Click that button.



Photo	Last Edit	Species	Name	Breed	Color	ID	Status	By	
	03/10/2022	Dog	Ainsley	Spaniel, Cavalier King Charles	White	POM-A-2805	In Foster Home (regular)	pom_mfinch	Hold

7. The **Hold** button has now been replaced by a **Checkout** button. Click the **Checkout** button. This will bring up the Adoption Hold screen, which initially looks like this:

Adoption Hold - Ainsley (POM-A-2805)

New Status *

--Select--

Hold Expiration *

24 hours

No expiration

Adoption hold price group *

--Select--

No charge

Finish

8. Click on **—Select—** under **New Status** and choose the appropriate status, which will be one of the two starting with “Trial Adoption”. If you want the dog to continue to be included on other rescue groups, pick the “publish” option. If you don’t want the dog to be included on other rescue groups, pick the “don’t publish” option.
9. Check **No expiration**. (We don’t use the automatically-expiring hold feature.)

10. Check **No charge**. (We don't charge any money when an adoption hold is placed.) The screen should now look something like this:

Adoption Hold - Ainsley (POM-A-2805)

New Status *
Trial Adoption (don't publish, from foster)

Hold Expiration *
 No expiration

Adoption hold price group *
--Select--
 No charge

Finish

11. Click **Finish**. The dog is now on Adoption Hold. If you navigate to the dog's page in Shelterluv you will see "On Hold: <prospective adopter's name>". The dog is now on hold until it is either adopted or the hold is released.

Ainsley

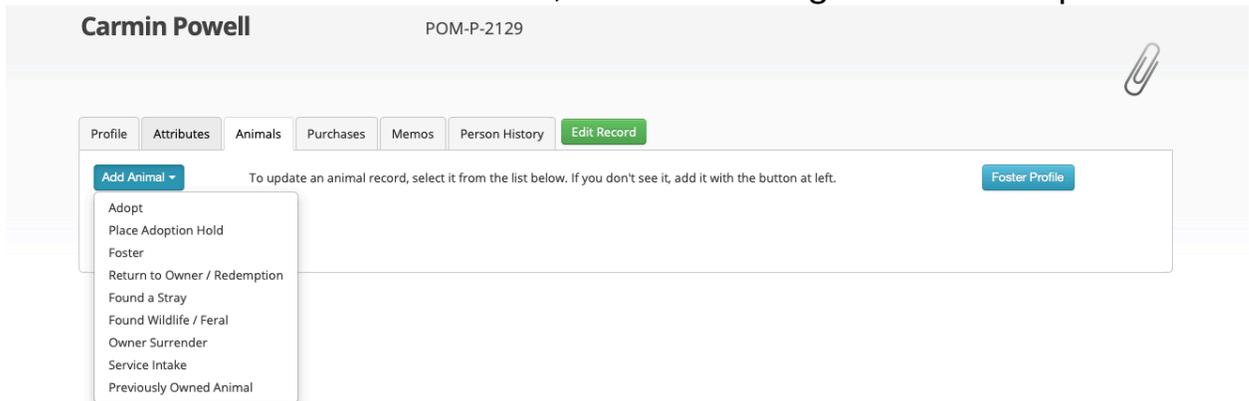
Location: [Monica Rua](#)
On Hold: [Monica Rua](#)

• Trial Adoption (don't publish, from foster)

Note: To release a hold without marking the dog as Adopted, navigate to the page for the person who has the dog on hold, click the Animals tab, and click the green Release button for that dog. You will then have to choose a new status.

How to mark a dog as Adopted

1. A dog may be getting marked adopted directly from a foster, or marked adopted from a pending adoption (that is, the new adopters already have the dog, and we just need to finalize the paperwork). In either case, make sure the adopter already has a record in Shelterluv, or add one (see **How to add a person** section).
2. Go to the Shelterluv page for the new adopter (maybe you just created it in step 1; otherwise find it by searching for the person's name).
3. Check on the person's Profile to enter their address, email, and phone number are entered. If not, please edit the information and add this information from LGL.
4. Click the **Animals** tab (3rd from the left).
5. Click the teal **Add Animal** button, which will bring down more options:



6. Click **Adopt**. This will bring up a list of currently available dogs.
7. Find the dog of choice by searching for their name. At the right side of the entry for this dog will be a teal **Adopt Now** button. Click that button, and then click the small blank area bar that appears below the **Adopt Now** button (it's a bug in Shelterluv that there's no text here).

The screenshot shows a search results table for 'grandp'. The table has columns for Photo, Last Edit, Species, Name, Breed, Color, ID, Status, and By. A teal 'Adopt Now' button is visible next to the entry for 'Grandpa Joe'.

Photo	Last Edit	Species	Name	Breed	Color	ID	Status	By	
	02/15/2022	Dog	Grandpa Joe ♀	Terrier, Rat	White/ Black	POM-A-2767	In Foster Home (regular)	pom_epaolini	Adopt Now

- Click the **Checkout** button. This will take you to a page called Shopping Cart that shows all the pending transactions (typically there will only be one transaction, which is the adoption you are in the middle of):

Shopping Cart

Person	
Name	John Sullivan
Address	
Email	
Phone	

Shelterpay Pays off!

- **Good for you:** Get an extra \$25 in donations on average!
- **Good for them:** Adopters get a \$15 coupon from Chewy!

[Pay With Shelterpay](#)
[Pay With cash/check](#)

Animals

	Name	Breed	Age	Gender	ID	Location	Price	Special Discount	Remove
	Grandpa Joe ♂	Terrier, Rat	14Y/20D	Male	POM-A-2767	Location: N/A	\$ 205.00 🔗	- \$ <input type="text"/>	✖
Adopt More									

Products list is empty. [Click here](#) to add a product

- Find out whether the adopter will be paying with credit card or with cash/check. If they are paying with a credit card, **skip to step 12**. If they are paying with cash/check, continue to step 10.

- Fill in the Special Discount field with the same value as the Price (we do this trick in order to capture the adopter's digital signature without charging anything to a credit card). The transaction will be marked FREE on upcoming screens that the adopter sees. You should make sure they know that it isn't actually free.

Animals

	Name	Breed	Age	Gender	ID	Location	Price	Special Discount	Remove
	Grandpa Joe ♂	Terrier, Rat	14Y/27D	Male	POM-A-2767	Location: N/A	\$ 205.00 🔗	- \$ <input type="text" value="205.00"/>	✖
Adopt More									

- Click **Pay With Shelterpay**, then click “Choose a reason”, then click “Shelterpay with cash/check (100% discount)”, then click Continue.
- Click **Pay With Shelterpay**. This brings up an Add Donation screen, which we ignore. Just leave the fields blank and click OK.

13. Next is the **How Will You Process Transaction?** screen. If the adopter has a smart phone and they are willing/able to finish the process on it, fill in their smart phone number and click the blue **Text Link** button. The smart phone number might be pre-filled if Shelterluv already knows their number (but you might want to make sure that the pre-filled number is a smart phone and not a home phone or whatever). If you do type in the number yourself, start it with “+1”. If you don’t, a message will tell you to do so. Once you have clicked **Text Link**, you’re done with initiating the adoption process, and you can **skip to step 17**.

How Will You Process Transaction? (?)

Send this transaction to John's smartphone where they can review, sign, and pay. X

John's Cell Phone:

+18312223333

Customer has no phone (?) Cancel Text Link

Use separate card reader (?)

14. If you made it to here, you must not have a smart phone number for the adopter, or for whatever reason you think it’s better for them not to use their smart phone. Click on **Customer has no phone**, which will take you to the Review screen in a new tab or window (next page):

Review



Grandpa Joe

Dog fee 2 \$205.00

Subtotal \$205.00

Tax \$0.00

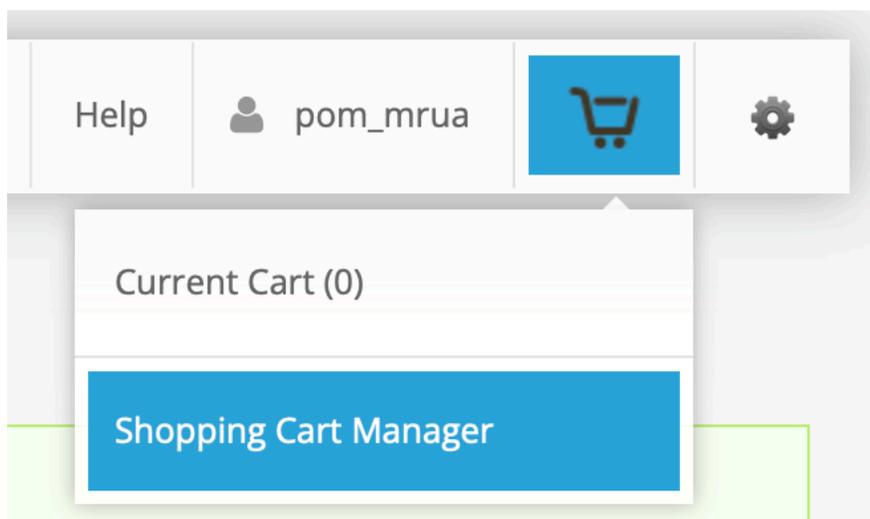
Total \$205.00

Next

15. If the adopter is not physically present, you can send them the URL of this Review page, and they can finish the process on their computer/iPad/whatever. To do this, click in the URL field at the top of the window, and then use Copy (Command-C). The URL will look similar to the following picture. Then paste it into a new email message. Use an email subject like "Adoption agreement for Grandpa Joe". Send it to the adopter's email address. Now **skip to step 17.**

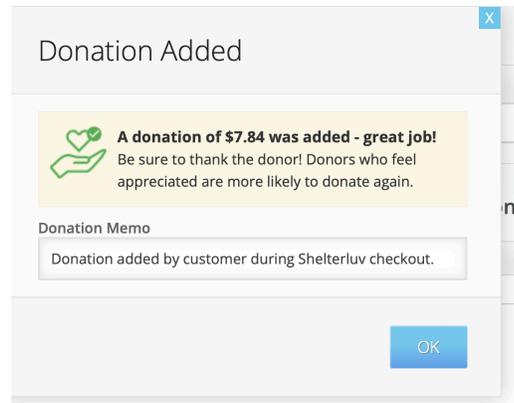
<https://checkout.shelterluv.com/orders/vs9jZNksbRCVCQR1TSa4rK/verify>

16. If the adopter is physically present, you can save a little time by finishing the process on the same computer you are using to run Shelterluv. On the Review page, just click **Next** and then go through the next few screens with the adopter, up to and including the screen in which credit card payments are made.
17. Now the adopter has either finished the Shelterpay process or you're waiting for them to finish it. When they have finished their part of the process, a little notification will appear saying "so-and-so has finished checkout" and providing a link to the Shopping Cart Manager. You can also manually check the status at any time by choosing Shopping Cart Manager from the menu that appears under the cart icon near the top right of the screen.

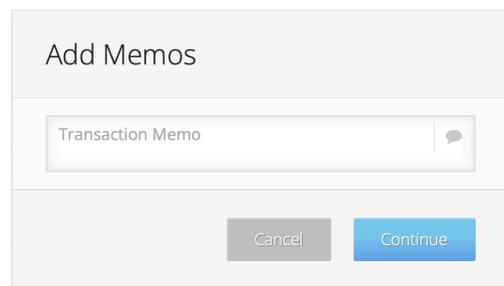


All of the underway Shelterpay transactions that you have initiated will appear in a list. When the adopter has finished their part, a **Complete Transaction** button will appear on the line for that adoption.

18. Click the **Complete Transaction** button. If the adopter chose to cover the processing fees, a “Donation Added” screen will appear informing you how much they donated, and you can click OK to continue.



19. Next you'll see an Add Memos screen. We don't usually add anything here, so click “Continue”.



20. Next you will be asked what materials to provide the adopter. Click the “Select All” checkbox above the Email column. This should select all of the following:

- Receipt
- Adoption Contract
- Rabies Vaccine Certificate
- Disclaimers (if any)
- Spay/Neuter Details
- Complete Medical History
- Microchip Info
- Free Vet Exams (Monterey Co.)
- Free Vet Exams (Santa Cruz Co.)

21. Now check whether there is a Rabies Certificate from the POMDR clinic, or whether instead there is a non-POMDR Rabies Certificate or other proof of rabies. (There must always be some proof of rabies vaccination.) If there is a Rabies Certificate from the POMDR clinic, **skip to step 24**. Otherwise continue to step 22.
22. Uncheck “Rabies Vaccine Certificate”, because if you leave it checked in this case, the adopter will receive an empty or partial certificate, which is useless.
23. Prepare an email (outside of Shelterluv) addressed to the adopter. Attach the non-POMDR Rabies Certificate or other proof of rabies.
24. Make sure the adopter’s email address is filled in at the bottom of the list of materials in Shelterluv. Hit **Complete** and then **OK** at the “Transaction completed” screen. Don’t forget to collect the check or cash if they didn’t pay by credit card!
25. If you prepared an email in step 23, send it now.

Note: Once a Shelterluv adoption process has started, an entry will appear on the Shopping Cart Manager page representing this adoption. This will remain until the adoption process is completed. If something gets messed up in the process and you want to start over, or abandon the adoption altogether, this is the place to do it. The Shopping Cart Manager page will usually show up near the end of the adoption process, but in case it doesn’t or you close it and then want to re-open it, you can always bring it up by following the instructions in step 17 above.

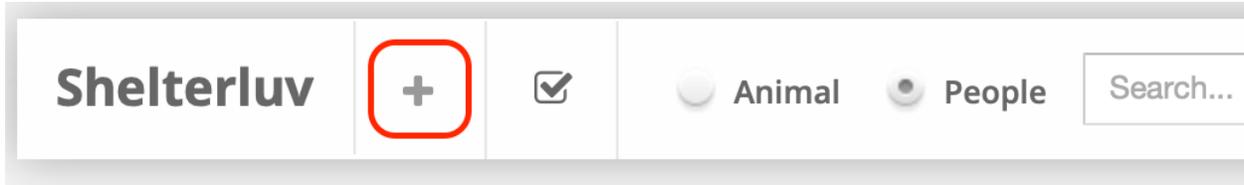
Note: When marking a dog adopted that is being adopted by the foster, it’s useful to start by making the dog’s status **In foster to adopt**. This will prevent the dog’s info from appearing on websites of other rescue groups. Then go to the foster’s page and follow all the steps above.

Note: We have a volunteer who will set the follow-up call in LGL.

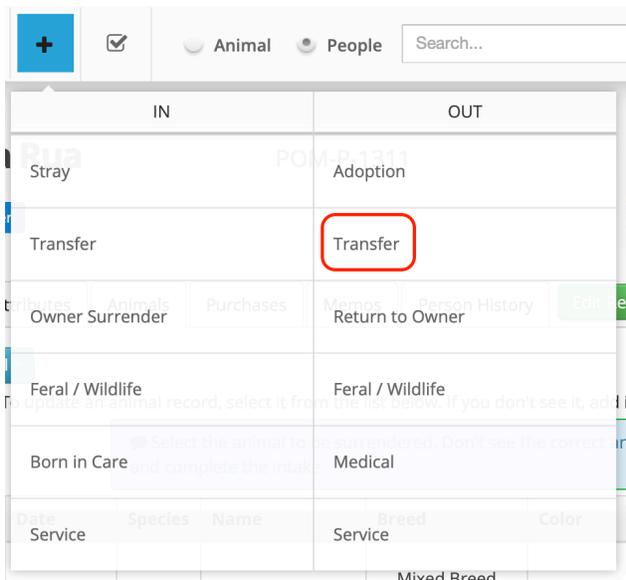
Note: Shelterluv’s help center has a good page that goes into more detail about some aspects of processing adoptions. You can find it here: <https://help.shelterluv.com/hc/en-us/articles/115002871448-How-do-I-process-adoptions-and-other-transactions->

How to transfer a dog to another organization

1. Mouse over (or tap on a mobile device) the big + sign in the header



2. Click **Transfer** in the **OUT** column



3. Find the appropriate organization in the list and click the blue **Add** button.

12/13/2019	Best Friends-Utah		Add ▾
08/06/2019	Jakes Wish Dog Rescue	Shelter	Add ▾
03/16/2019	Animal Compassion Team	Brick & Mortar Shelter - No Animal Control	Add ▾

4. Choose **New Transfer To**
5. A page listing all current POMDR dogs will appear. Find the appropriate dog and click the green **Transfer Out** button.

How to mark a dog as Deceased

Only Carie or a vet staff member should do this.

1. Go to the dog's record.
2. Click the **Medical** tab.
3. Click the blue **Mark Medical Outcome** button.

The screenshot shows the Shelterluv interface for a dog named Reeba. At the top, there's a navigation bar with the Shelterluv logo, a search bar, and user information (pom_cbroecker). Below the navigation bar, the dog's name 'Reeba' is displayed, along with a photo and location 'Michelle Bumgardner'. The ID# is POM-A-2051. A 'Hospice' tag is visible. The 'Medical' tab is selected, and the 'Mark Medical Outcome' button is highlighted with a red box. Other tabs include Profile, Processing, Behavioral, Memos, History, and Edit Record. Below the tabs, there are buttons for Medical Summary, Diagnosis, Diagnostic Tests, Vaccines, Daily Observation, Physical Exam, Treatment, Proc & Surg, and Health Consults. The 'Mark Medical Outcome' button is highlighted with a red box. Below the buttons, there are fields for Est. Birthdate (03/04/2012), Age (8Y/ 27D), Spay/Neutered Date (No S/N Information), and Spay/Neutered Vet's Name (No S/N Information). The weight is listed as 78 lbs.

4. Choose either **Unassisted Death in Custody** or **Euthanasia**

This image shows a close-up of the 'Mark Medical Outcome' dropdown menu. The menu is open, showing two options: 'Unassisted Death in Custody' and 'Euthanasia'. The 'Mark Medical Outcome' button is highlighted with a red box. Below the dropdown menu, the text 'Spay/Neutered Date: No S/N Informat' is visible.

5. An **Outcome** form appears. Fill in the **Date of Death**.

Outcome - Unassisted Death in Custody

Date of Death*

03/31/2020

Memo type

Deceased

Memo

Euthanized at Cottage Vet, Communal Cremation

Save

6. The **Memo type** is auto-filled to **Deceased**. In the **Memo** section, add any relevant info.
7. Click the blue **Save** button.

Overview: Tracking & invoicing medical care for non-foster animals

Most of the animals receiving medical care via POMDR are foster dogs. POMDR covers the medical costs for foster dogs, so in those cases there is no need for an invoicing process. This section is an overview for how medical care is tracked and invoiced in Shelterluv for other animals, the ones that are not POMDR foster dogs. Animals in this category include:

- Helping Paw client dogs and cats
- Staff/Board dogs and cats
- Dogs and cats from AFRP or other partnering organizations
- Adopted dogs whose medical care has been sponsored or is being paid by the adopter
- Community Care dogs and cats
- Animals whose medical care is being handled by POMDR because they were injured by a POMDR dog

There are four aspects of tracking and invoicing medical care for these animals:

1. Creating a Shelterluv record for the animal (and owner if necessary).

This is only done once for each animal. If the animal does not have a Shelterluv record, follow the steps in the section called “**How to add a non-POMDR animal to Shelterluv (for medical care)**”. If you’re not sure whether the animal in question is in Shelterluv yet, first follow the steps in the section of this document called “**How to find a dog’s record**” (even in the cases where the animal in question is not a dog).

2. Specifying the non-POMDR animal’s category

This is only done once for each animal. Typically you would do it just after creating a Shelterluv record for the animal. But in some cases the animal is already in Shelterluv, but this step hasn’t been done yet, in which case you need to do it now. The steps are in the section of this document called “**How to specify the category for a non-POMDR animal**”.

3. Adding medical info to the animal's Shelterluv record.

If POMDR has access to old vet records, those records can be added to Shelterluv any time after the animal's Shelterluv has been created. Also, when an animal is treated at the POMDR Board Vet Clinic, the vets there will update Shelterluv with info about procedures and medications. This is handled for non-foster animals in exactly the same way as it is for POMDR foster dogs.

4. Processing payments for medical care.

This is covered by the section of this document called "**How to process medical care payments**".

How to add a non-POMDR animal to Shelterluv (for medical care)

See the section called “**Overview: Tracking & invoicing medical care for non-foster animals**” for information about when to use these steps.

1. Obtain this information about the animal:
 - Name (note that the animal’s name will be entered a special way, described below in step 6A.)
 - Breed
 - Color
 - Gender
 - Weight
 - Age/birthdate
 - Altered or not
2. The animal might be coming from a person (e.g., a Helping Paw client or volunteer), or it might be coming from a partner organization. If it is coming from a person, go on to step 3. If it is coming from a partner organization, **skip to step 8 below**.
3. Find the record for the animal’s owner, or create one if the animal’s owner is not already in Shelterluv (following the steps in the section “**How to add a person**”).
4. Click the **Animals** tab.
5. Click the blue **Add Animal** button near the top. Choose **Service Intake** from the menu that appears.
6. The following text will appear above the list of animals (if any): “Select the animal for the service intake. Don't see the correct animal? Click [here](#) to create a new one and complete the intake.” Since these steps are for the case where the animal isn’t already in the system, you will always have to click the word “here”. Do that now.
7. Now **skip to step 10 below**.
8. Find the partner organization in the list of partner organizations. You can find this list by clicking on the big word **Shelterluv** at the top left of the screen, then clicking on the **PARTNERS** tab.
9. There are two choices for how to start creating the new animal. In the list of partners, you can click the blue **Add** button on the right side of

the row, and then choose **New Service In**. Or, you can click on the partner's name to go their record, then click on the **SERVICE IN** tab, then click the green **New Service In** button. (Note that in this case you will see a list of all the service intakes that have ever occurred from this partner.)

10. A new window or tab will open containing the Service Intake form. Fill the form out, as follows:
 - A. For **Intake Sub-type** select **Medical Care**
 - B. For **Intake Date** put the current date, even if the actual medical care will be later. Shelterluv won't let you put a future date here, but when the actual medical care occurs the correct date can be supplied.
 - C. Leave **Condition at Intake** alone; it's not required and not helpful here.
 - D. For **Intake Into** select **Shelter**
 - E. You can leave **Intake Notes** empty.
 - F. For **Location** select **Boand Clinic** and then on the next line (which will appear only after you select **Boand Clinic**) select **Suite** or **Wall Kennel / Wire Crate**, whichever is appropriate for this dog. Note that the animal is not actually going to this location yet; the location won't be put in the animal's record until the actual intake when the medical care is about to occur.
 - G. For **Current Status** select **Pre-Intake Helping Paw** (for Helping Paw animals), **Pre-Intake Staff/Board** (for POMDR Staff/Board animals), **Pre-Intake Community Care** (for Community Care animals), or **Pre-Intake non POMDR** (for any other cases).
 - H. Fill out the rest of the form with the animal's info (from step 1) as you would for any other type of intake, except that we handle the name specially here: For Staff/Board, Community Care or Helping Paw animals, enter the animal's name with the guardian's last name, e.g. "Zeta Rua" or "Dulce Fernandez". For partner organization animals, enter the animal's name with the organization name as if it were the animal's last name, e.g. "Sabrina GoCat" or "Juliette AFRP".
 - I. Click the **Finish** button at the bottom of the long form.

You have now completed the “Pre-intake”. The animal’s record is now available so you can add vet info, etc. This is kind of a weird one-time state that lasts until you click the green **Complete Intake** button when it is actually time to process the medical treatment. Until then, the location will show as “N/A”, which is strange but you can ignore it.

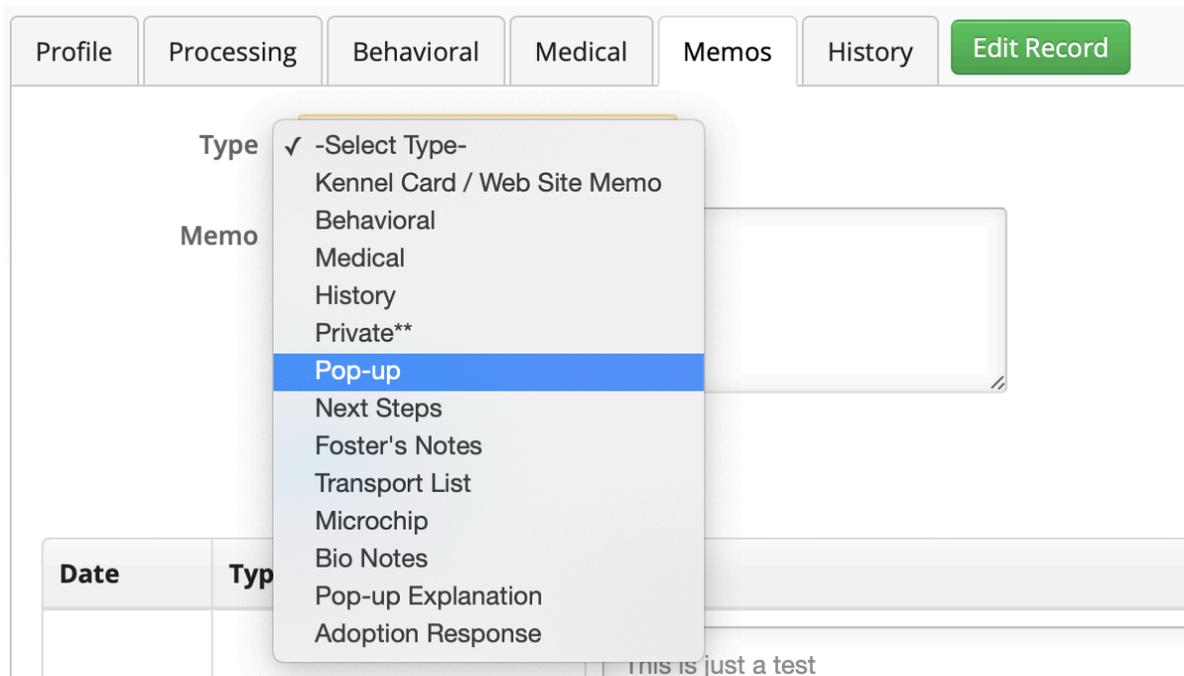
If you do click **Complete Intake** before the medical treatment is being processed, the animal will appear on the “home page” list of POMDR dogs, which is confusing so we want to avoid that. If this happens, follow the steps in the section below called “**Oops, I accidentally did an Intake instead of a Pre-intake!**”.

The next step is to make a pop-up memo for the non-POMDR animal’s category. See the next section in this document, called “**How to specify the category for a non-POMDR animal**”

How to specify the category for a non-POMDR animal

See the section called “**Overview: Tracking & invoicing medical care for non-foster animals**” for information about when to use these steps.

1. Go to the animal’s profile page
2. Click the **Memo** tab
3. From the **Type** menu, choose **Pop-up**



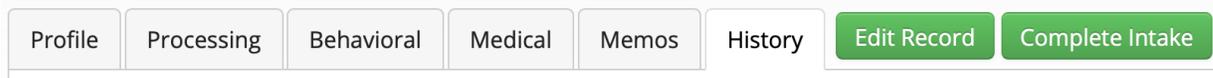
4. Now type in the category of non-POMDR animal, one of the following (ideally you would pick these from a list but Shelterluv doesn't provide a way to do that):
 - Helping Paw - Needs Charges
 - Sponsored Care - Needs Charges
 - Staff/Board - Needs Charges
 - Community Care - Needs Charges
 - Partner Organization - Needs Charges
5. Click **Post** to finish creating the pop-up memo.

How to process medical care payments/completion

See the section called “**Overview: Tracking & invoicing medical care for non-foster animals**” for information about when to use these steps.

Note that we do not use Shelterluv’s medical care payment process for sponsored dogs that are currently in foster care (because we can’t figure out a way to do that; otherwise we would). Carie handles these cases separately.

1. In order to process medical care for any animal, that animal has to be in Shelterluv. Follow the steps above in the section called “**How to add a non-POMDR animal to Shelterluv (for medical care)**” to make sure the animal is in Shelterluv.
2. Go to the Shelterluv record for the animal in question.
3. Look to see if there’s a green **Complete Intake** button to the right of the green **Edit Record** button.

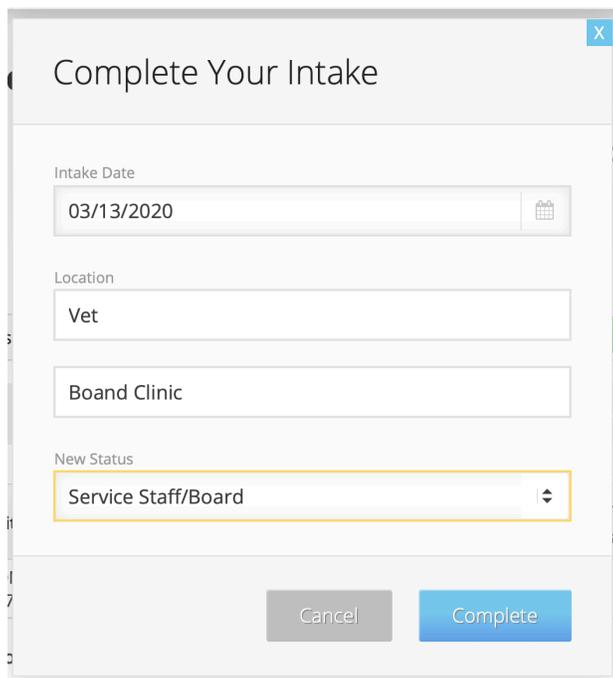


4. If there is no green **Complete Intake** button, and the medical care is for an animal that was injured by a POMDR dog, there’s nothing more to do for the medical payment processing, since we don’t charge anyone for that case. **You’re done with these steps, skip the rest of this section.** Otherwise go on to step 5.
5. If there is no green **Complete Intake** button, **skip to step 8 below.**
6. If there is a green **Complete Intake** button, the animal currently has a “Pre-Intake” status, and you should press the button.
7. A form named **Complete Your Intake** will appear. Fill it out as follows:
 - A. For **Intake Date** enter the current date. (If you click in the field before typing, the current date should appear; otherwise you can click on the calendar icon and then the current day.)
 - B. For **Location** pick **Boand Clinic**
 - C. A new field will appear after **Location**. Pick **Suite** or **Wall Kennel / Wire Crate**, whichever is appropriate for this dog..

D. Pick the appropriate **New Status** as follows:

- If this is a Staff/Board pet, pick **Service Staff/Board**
- If this is a Community Care pet, pick **Service Community Care**
- If this is a Helping Paw pet, pick **Service Helping Paw**
- If this is an adopted dog whose medical care is sponsored, pick **Service Sponsored Adoption**
- If this is any other non-POMDR animal, such as an animal from AFRP or another partnering organization, or a dog that is being treated for injuries caused by a POMDR dog, pick **Service non POMDR**

E. Click **Complete**



The screenshot shows a web form titled "Complete Your Intake". It contains the following fields:

- Intake Date:** A date input field containing "03/13/2020" with a calendar icon to its right.
- Location:** A text input field containing "Vet".
- Board Clinic:** A text input field containing "Boand Clinic".
- New Status:** A dropdown menu with "Service Staff/Board" selected and highlighted by a yellow border.

At the bottom of the form are two buttons: a grey "Cancel" button and a blue "Complete" button.

- In the animal's record, click the **History** tab and then click **Caretakers**. This will show the person or partner organization associated with the most recent Service In. If the caretaker was a person, continue on to step 8. If the caretaker was a partner organization, **you're done with this section, and you need to start with the steps in the section called How to finish processing medical care for an animal in a partner organization**. The next screenshot shows an example like this, where the animal's previous caretaker was a partner organization:

The screenshot shows a web interface for an animal's record. At the top, there are tabs for Profile, Processing, Behavioral, Medical, Memos, and History, with an 'Edit Record' button. Below these is a sub-navigation bar with Status, Location, Categories, Visits, Caretaker (highlighted), and Profile Edits. The main content area features a table with the following data:

Start date	End date	Caretaker	Custody Type
03/24/2022 01:52 pm	--	Peace of Mind Dog Rescue	In Shelter Care
03/24/2022 01:52 pm	--	Hitchcock Road Animal Services	Service In

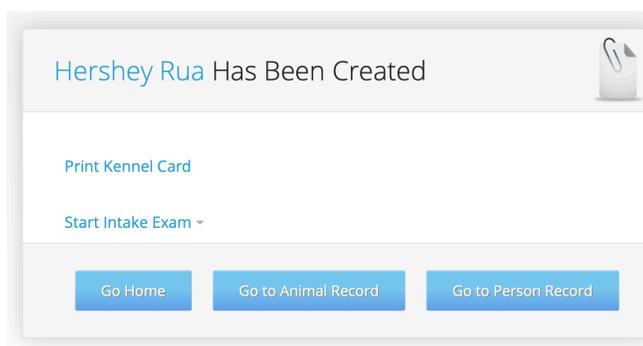
Below the table is an 'Associated Person' section with the following details:

- Date: N/A
- Person Name: --
- Person ID: --
- Person Address: --
- Person Phone: --
- Person Email: --

- You are now in the case where the animal will be returned to a person (not to a partner organization). Click on the person's name in the list of caretakers to go that person's record.
- On the person's record, click the **Animals** tab. A list of animal interactions associated with that person will appear, ordered from most recent to longest ago. Often there will be multiple lines with the same animal.
- Click the green **Select** button for the animal in question. (Only the most recent interaction with this animal will include the **Select** button.)

	12/01/2019	Dog	Autumn	Terrier, Rat	Beige/White	POM-A-1931	Foster	pom_azepp	
	11/22/2019	Dog	Hershey Rua	Mixed Breed (Medium)	Black/None	POM-A-1961	Service Out	pom_mruea	Select ▾
	11/22/2019	Dog	Hershey Rua	Mixed Breed (Medium)	Black/None	POM-A-1961	Foster Returned		<ul style="list-style-type: none"> Service Intake Owner Surrender Transfer Custody to Partner Found as Stray Transfer to New Owner
	11/22/2019	Dog	Hershey Rua	Mixed Breed (Medium)	Black/None	POM-A-1961	Foster	pom_ameee	

12. Select **Service Intake**. A form named **Intake - Service** will appear.
13. Some parts of the form should be filled in already. Finish filling it out as follows:
- A. For **Intake Sub-type** pick **Medical Care**
 - B. For **Intake Date** enter the current date. (If you click in the field before typing, the current date should appear; otherwise you can click on the calendar icon and then the current day.)
 - C. You can ignore **Condition at Intake**
 - D. For **Intake Into** pick **Shelter** (should be automatically chosen).
 - E. You can ignore **Intake Notes**
 - F. For **Location** pick **Boand Clinic**
 - G. A new field will appear after **Location**. Pick **Suite** or **Wall Kennel / Wire Crate**, whichever is appropriate for this dog
 - H. Pick the appropriate **Current Status** as follows:
 - If this is a Staff/Board pet, pick **Service Staff/Board**
 - If this is a Community Care pet, pick **Service Community Care**
 - If this is a Helping Paw pet, pick **Service Helping Paw**
 - If this is an adopted dog whose medical care is sponsored, pick **Service Sponsored Adoption**
 - If this is an animal from a partnering organization, or an animal that is being treated for injuries caused by a POMDR dog, pick **Service non POMDR**
 - I. Scroll down to the bottom and click **Finish**.
 - J. If any required Biological Information is missing, you will be prompted to fill it in. Do so and click **Finish** again.
14. A small dialog box will appear with a confusing title, as shown below. Click **Go to Person Record**.

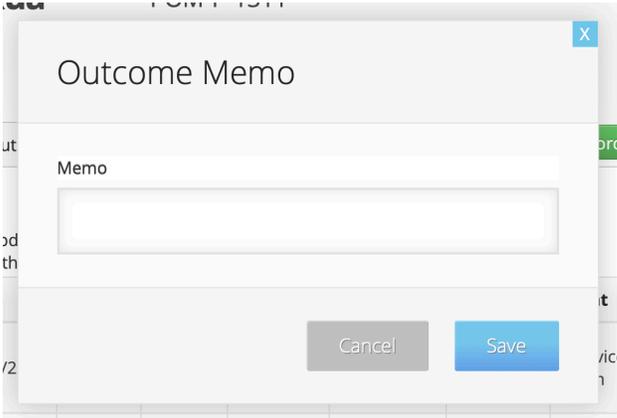


15. In the **Animals** tab on the person record, click the green **Service Out** button:

Photo	Date	Species	Name	Breed	Color	Animal ID	Event	By	Action
	03/03/2020	Dog	Hershey Rua	Mixed Breed (Medium)	Black/None	POM-A-1961	Service In	pom_mruea	<div style="border: 1px solid gray; padding: 2px;"> Service Out Clinic Discharge </div>
				Cattle Dog					

16. Click **Clinic Discharge**. This will replace the green **Service Out** button with a gray **Complete Outcome** button. Click that button.

17. A small dialog box will appear called **Outcome Memo**. Text you enter here will be recorded in the animal’s list of memos. It is helpful to enter a brief phrase describing the animal’s vet visit, such as “Dental” or “Fixed broken leg”. Type appropriate text and click **Save**.

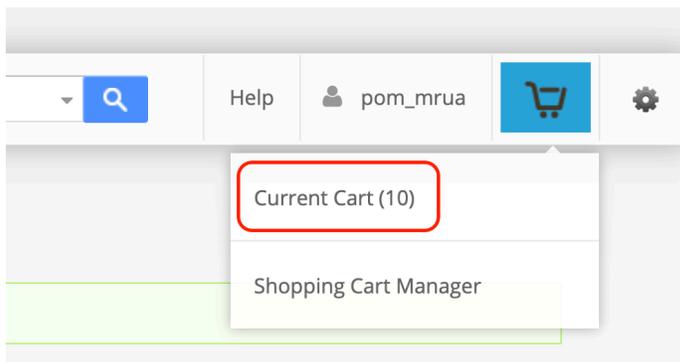


18. You’ll now be at a page that lists all available services and medications and their prices. For each medication or service that the animal received, click the green **Add to Cart** button. There are three prices to choose from for each item (POMDR Discount, Courtesy Discount, Community Discount). For Staff/Board and Helping Paw pets, choose the items that end with “POMDR Discount”. For partner organizations and sponsored care pets, choose the items that end with “Courtesy Discount”. For any Community Care pets (POMDR Alumni, their siblings or volunteers’ pets), choose the items that end with “Community Discount.” After you click the **Add to Cart** button, it will change to a gray **Checkout** button. If the animal received more than

one instance of a particular medication or service, just click **Add to Cart** once — you will be able to specify quantity later. If you accidentally add a wrong item, don't worry now, you will be able to remove it later.

00	Medications	Dasuquin Small Dog - POMDR Discount	N/A	\$40.00	Checkout
00	Medications	Dasuquin Lg Dog - POMDR Discount	N/A	\$47.75	Add to Cart
00	Medications	Dasuquin Lg Dog - Courtesy Discount	N/A	\$75.00	Add to Cart
00	Medications	Dasuquin Small Dog - Courtesy Discount	N/A	\$60.00	Add to Cart

19. When you have added all of the medications and services to the cart, you're ready to go to the Shopping Cart page. If there are any gray **Checkout** buttons visible (they all act the same), you can click one of those. Otherwise, click on the shopping cart icon and then click **Current Cart**, as shown here:



20. Now you're at the **Shopping Cart** page. From here you can remove anything that you accidentally added in step 11. Also, you can change the quantity of anything that the animal received more than once.
21. If the animal was injured by a POMDR dog, then we don't charge anything, but we still have to go through this process once to get the injured animal into the system. In that case, For each line item in the **Products** section of the shopping cart, note the price and put that

same price in the **Special Discount** column. This will zero out all the charges.

22. If you are preparing an invoice that will be paid through Shelterpay, **skip to step 35**. Otherwise, you are creating an invoice that will be handled through a journal entry, and continue to step 22.
23. When everything looks right, click the **Continue With Payment** button. Do this even if you're not actually taking payment now, so you can create a receipt/invoice. Also do this even if the total charge (due to special discounts) is zero, just as part of finishing the checkout process.

Person	
Name	Allison McKee
Address	121 4th Street, Pacific Grove, CA, 93950
Email	allisonmsouza@gmail.com
Phone	(831) 601-6121

Secure and easy checkout with Shelterpay Continue with Payment

➤ Shelterpay provides a safe and secure way to complete this transaction

Products

Product ID	Name	Price	Quantity	Special Discount	Remove
900	Bravecto K9 4.4-9.9 lbs (per tablet) - POMDR Discount	\$47.00	<input type="text" value="1"/>	-\$ <input type="text"/>	✖

[Add Another Item](#)

24. An **Add Donation** window will appear. Just click the blue **OK** button to move on.

Add Donation

Donation Amount

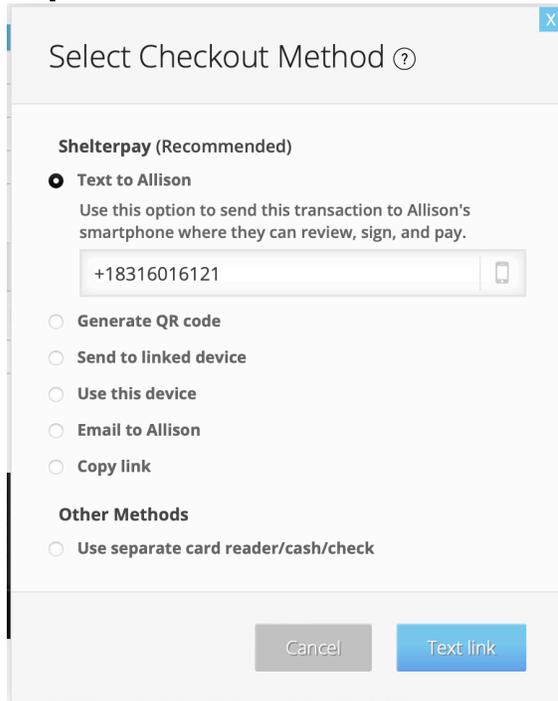
Donation Memo

Department

OK

Exam	\$25.00	1
------	---------	---

25. A **Select Checkout Method** window will appear. Click the **Use separate card reader/cash/check** option, then click **Continue**.



The screenshot shows a dialog box titled "Select Checkout Method" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Shelterpay (Recommended)" and "Other Methods".

Shelterpay (Recommended)

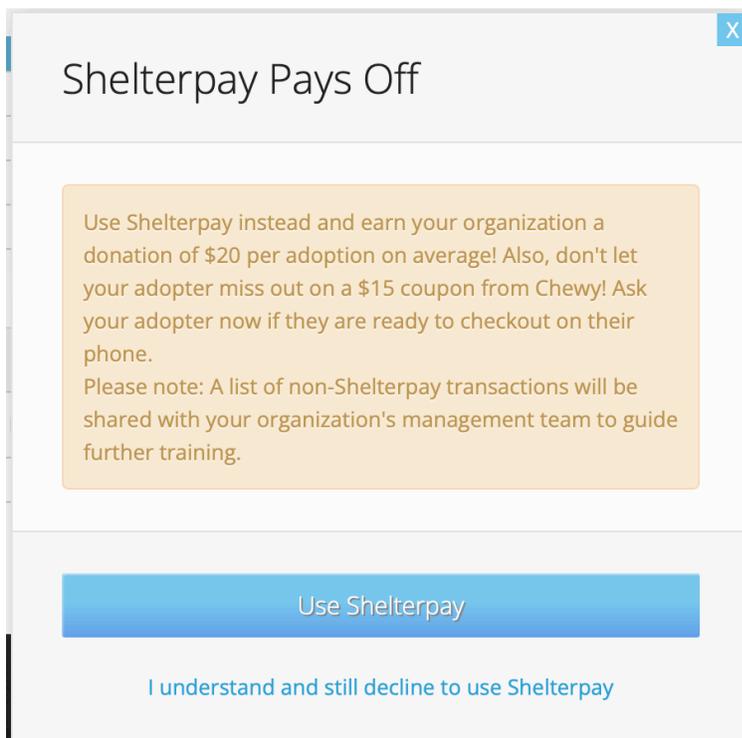
- Text to Allison**
Use this option to send this transaction to Allison's smartphone where they can review, sign, and pay.
A text input field contains "+18316016121" and a mobile phone icon.
- Generate QR code**
- Send to linked device**
- Use this device**
- Email to Allison**
- Copy link**

Other Methods

- Use separate card reader/cash/check**

At the bottom of the dialog, there are two buttons: "Cancel" (disabled) and "Text link" (active).

26. A window will open that asks if you're sure you'd like to use another method for payment, click **I understand and still decline to use ShelterPay**.



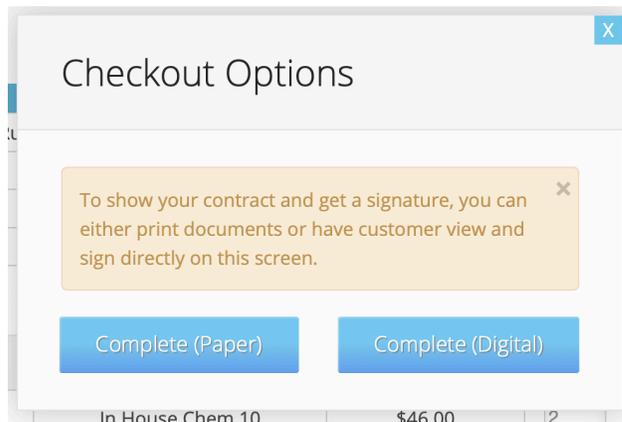
The screenshot shows a dialog box titled "Shelterpay Pays Off" with a close button (X) in the top right corner. The dialog contains a large orange box with text and two buttons at the bottom.

Use Shelterpay instead and earn your organization a donation of \$20 per adoption on average! Also, don't let your adopter miss out on a \$15 coupon from Chewy! Ask your adopter now if they are ready to checkout on their phone.

Please note: A list of non-Shelterpay transactions will be shared with your organization's management team to guide further training.

At the bottom, there are two buttons: "Use Shelterpay" (blue) and "I understand and still decline to use Shelterpay" (blue).

27. A **Checkout Options** window will appear. Click the blue **Complete (Paper)** button.

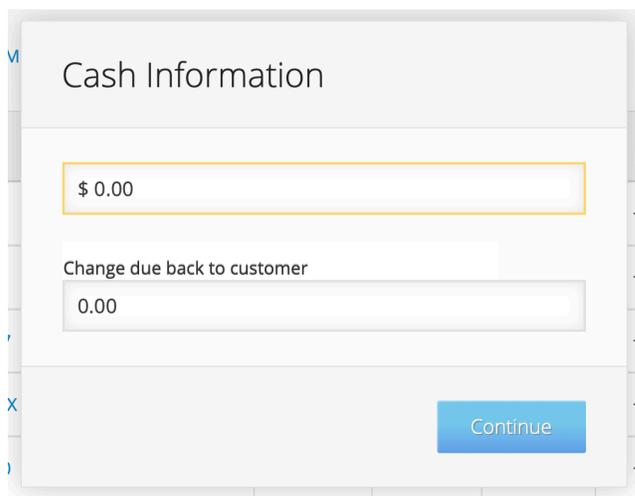


28. The **Checkout** screen will appear, which lists all the sub-transactions and shows the total due. If for some reason you want to create an invoice without accepting payment at this time, you could print this page, because this is the only place that lists all the charges and includes a total. You would print this page as you would print any web browser page (**Print...** from the **File** menu, or Command-P).

29. Beneath the **Payment** banner click **Choose Payment Options**

30. Select **Cash** from the list that appears

31. A **Cash Information** window will appear. Enter the total amount paid (which should be the same as the total amount due) in the top field and click the blue **Continue** button.



32. This will leave you back at the **Checkout** screen again, now showing a balance of \$0.00. Click the blue **Complete Transaction** button

Checkout

Customer Name : [Monica Rua](#)
Date : 03/03/2020

ITEMS	QUANTITY	PRICE	SUBTOTAL	SPECIAL DISCOUNT
Exam	1	\$25.00	\$25.00	- \$ <input type="text"/> X
X-Ray 1 View	1	\$75.00	\$75.00	- \$ <input type="text"/> X
In House Chem 17	1	\$70.00	\$70.00	- \$ <input type="text"/> X
In House Snap 4DX	1	\$34.00	\$34.00	- \$ <input type="text"/> X
In House Chem 10	2	\$46.00	\$92.00	- \$ <input type="text"/> X

Invoice Totals

Invoice Subtotal	\$ 296.00
Sales Tax	\$ 0.00
Total Due	\$ 296.00

Payment

Cash	\$ 296.00
Balance Amount	\$0.00
Total Paid	\$ 296.00

33. An **Add Memos** window will appear. Text you enter here will be visible later in the **Purchases** tab for the person’s record. Enter the animal’s name with a word or three about what was done, for instance “Hershey dental”. Then click the blue **Continue** button.

Add Memos

Transaction Memo

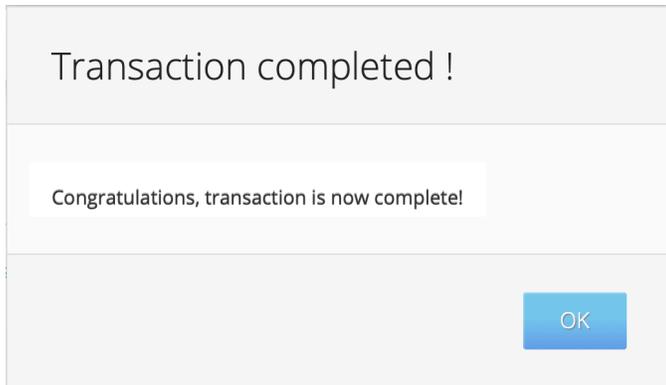
34. Up comes a form called **Choose materials to provide to adopter**. Check **print** to the right of **Receipt** and uncheck all the other boxes. Then click the blue **Complete** button.

Select All	<input type="checkbox"/>	<input type="checkbox"/>
Receipt	<input type="checkbox"/> Email	<input checked="" type="checkbox"/> Print
License	None Found	
Service Intake Contract	<input type="checkbox"/> Email	<input type="checkbox"/> Print
Spay / Neuter Details	None Found	
Complete Medical History	<input type="checkbox"/> Email	<input type="checkbox"/> Print
Rabies Vaccine Certificate	None Found	
Disclaimers	None Found	
Behavior Assessment	None Found	

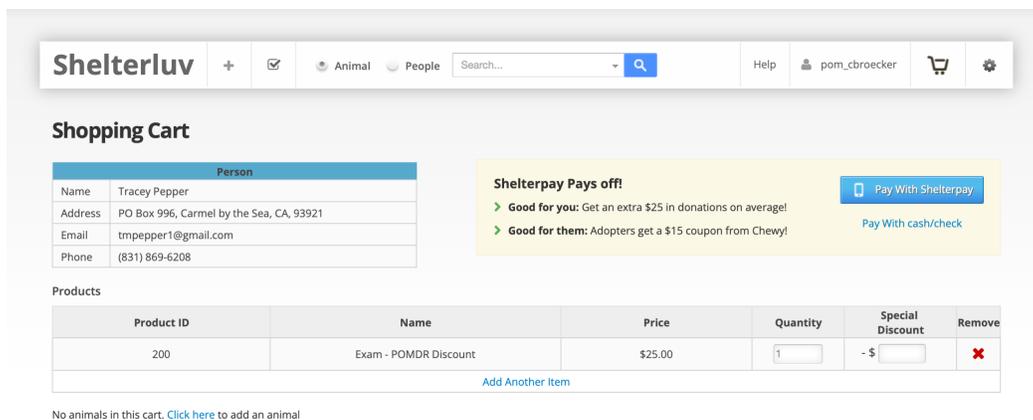
Email Address

35. A new window or tab will open showing the purchase receipt. You must then print this page as you would print any web browser page (**Print...** from the **File** menu, or Command-P).

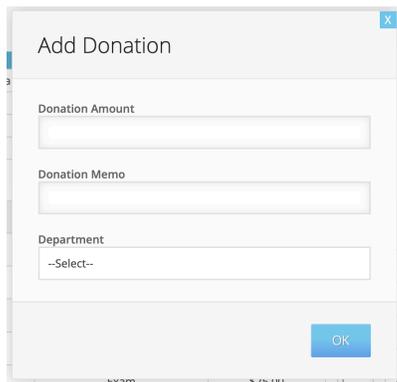
36. In the original window/tab (not the extra one from step 34), a **Transaction completed!** message will appear. Just click **OK**. You are done now.



37. If you got here, the invoice will be paid with Shelterpay. When everything looks right, click the blue **Pay With Shelterpay** button.



38. This brings up an Add Donation screen, which we ignore. Just leave the fields blank and click **OK**.



39. Next is the **Select Checkout Method** screen. The person's cell number should already be filled in. If it is not, you can add the cell number. You must start it with "+1". If you don't, a message will tell you to do so. (If you had to add the cell number, that means the person's contact info is missing in Shelterluv. When you are done with this transaction go to their Shelterluv record and fill in the address, email, and cell phone number or else their pet's microchip won't be registered properly.)

Select Checkout Method ?

Shelterpay (Recommended)

Text to Allison
Use this option to send this transaction to Allison's smartphone where they can review, sign, and pay.

+18316016121

Generate QR code

Send to linked device

Use this device

Email to Allison

Copy link

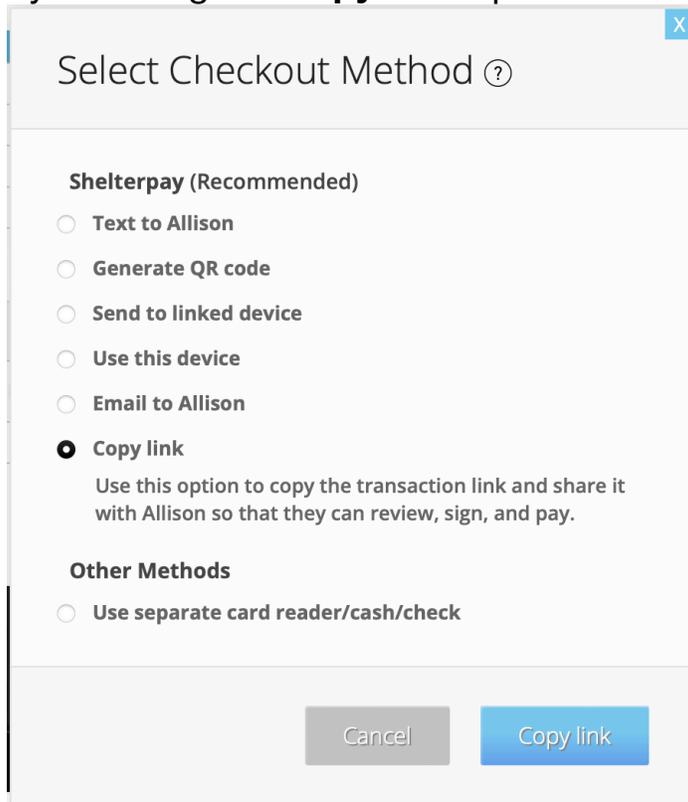
Other Methods

Use separate card reader/cash/check

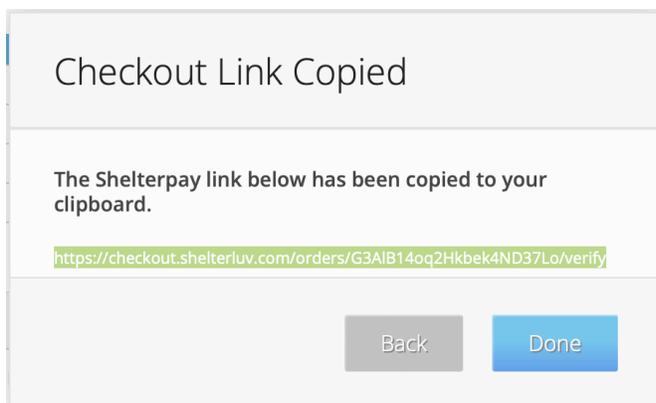
Cancel Text link

40. Click the blue **Text Link** button. Once you have clicked **Text Link**, you're done with initiating the payment process.

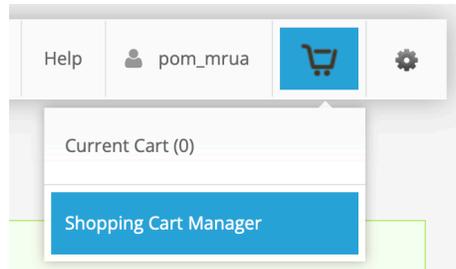
41. You can also copy a payment link which can be emailed to the client by choosing the **Copy Link** option.



42. This will generate a link that you can paste into an email or text message:



43. When they have finished their part of the payment process, a little notification will appear saying “so-and-so has finished checkout” and providing a link to the Shopping Cart Manager, which you should click. You can also manually check the status at any time by choosing Shopping Cart Manager from the menu that appears under the cart icon near the top right of the screen.



44. In the Shopping Cart Manager screen, all of the underway Shelterpay transactions that you have initiated will appear in a list. When the client has finished their part, a **Complete Transaction** link will appear in the **Action** column for that transaction. Click the **Complete Transaction** link.

Shelterluv + [Email] [Animal] [People] [Search] [Help] [pom_cbroecker] [Shopping Cart] [Settings]

Adopters who purchase MetLife pet insurance are reimbursed \$250 for the average claim.

Manage Carts

Time Started	Started By	Guest Name	Item(s)	Action
03/11/2022 04:17 PM	pom_cbroecker	Patricia Van Dyke	Donation	Resend Checkout Edit Delete
03/11/2022 03:56 PM	pom_cbroecker	Allison McKee	Idexx Fecal w/giardia - POMDR Discount, In House Sedivue Regular - POMDR Discount, Exam - POMDR Discount, Metronidazole 125, 250, 500mg - POMDR Discount, X-Ray 1 View - POMDR Discount, Cerenia 24 mg x 4 - POMDR Discount, Cerenia Injection - POMDR Discount, Cephalexin Caps 250 mg/500 mg - POMDR Discount	Resend Checkout Edit Delete
03/12/2022 12:13 PM	pom_cbroecker	Tracey Pepper	Exam - POMDR Discount (\$1.19 Donation)	Complete Transaction Refund
03/11/2022 03:07 PM	pom_cbroecker	Margaret Abeyta	Clavamox 250 mg - POMDR Discount, Pain Injection - Torbugesic - POMDR Discount, Carprofen/Rimadyl/Quellin 25 mg - Each - POMDR Discount	Resend Checkout Edit Delete
03/11/2022 03:12 PM	pom_cbroecker	Monica Rua	Dental - POMDR Discount, Anal Gland Expression - POMDR Discount	Resend Checkout Edit Delete

Shelternav Donation Totals Last 10 Shelternav Donations

45. Next you’ll see an Add Memos screen. We don’t usually add anything here, so click **Continue**.

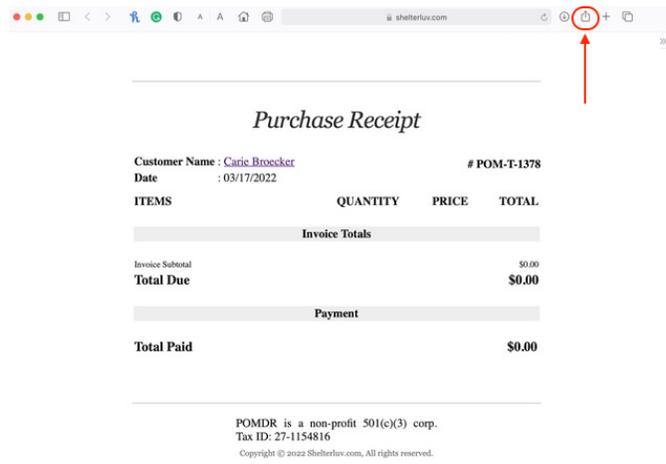
46. Next you will see a screen called “Choose materials to provide to adopter” (never mind that this isn’t about an adoption). Uncheck everything except the **Print** checkbox on the far right of the **Receipt** row, then click the blue **Complete** button.

Choose materials to provide to adopter

Select All	<input type="checkbox"/>	<input type="checkbox"/>
Receipt	<input type="checkbox"/> Email	<input checked="" type="checkbox"/> Print
License	None Found	
Service Intake Contract	<input type="checkbox"/> Email	<input type="checkbox"/> Print
Spay / Neuter Details	None Found	
Complete Medical History	<input type="checkbox"/> Email	<input type="checkbox"/> Print
Rabies Vaccine Certificate	None Found	
Disclaimers	None Found	
Behavior Assessment	None Found	

Email Address

47. The receipt will now appear in a new window or tab. You can click the **Share** icon (box with upward-pointing arrow) and email it to the person. Include the dog’s name in the email subject, like “Receipt for Snuffly’s vet care”. (We don’t use Shelterluv’s built-in email mechanism because they mention adoption, which this isn’t.) Now the transaction is complete.



How to finish processing medical care for an animal in a partner organization

These steps are used only when you've reached step 8 in the previous section (**How to process medical care payments/completion**), and you saw in the list of previous caretakers that this animal came from a partner organization rather than from an individual. Here's a repeat of the screenshot from where we were at step 8:

The screenshot shows a web interface for an animal record. At the top, there are tabs for Profile, Processing, Behavioral, Medical, Memos, History, and Edit Record (highlighted in green). Below these are sub-tabs for Status, Location, Categories, Visits, Caretaker (highlighted in green), and Profile Edits. A table lists caretakers with columns for Start date, End date, Caretaker, and Custody Type. The table contains two entries: one for 'Peace of Mind Dog Rescue' and one for 'Hitchcock Road Animal Services'. Below the table is an 'Associated Person' section with fields for Date, Person Name, Person ID, Person Address, Person Phone, and Person Email, all showing 'N/A' or '--'.

Start date	End date	Caretaker	Custody Type
03/24/2022 01:52 pm	--	Peace of Mind Dog Rescue	In Shelter Care
03/24/2022 01:52 pm	--	Hitchcock Road Animal Services	Service In

Associated Person

Date: N/A
Person Name: --
Person ID: --
Person Address: --
Person Phone: --
Person Email: --

1. Click on the name of the partner organization in the Caretaker list to go to that organization's record.
2. Click on the **SERVICE OUT** tab.

The screenshot shows the record for 'Hitchcock Road Animal Services'. At the top, there are tabs for TRANSFERS FROM, TRANSFERS TO, STRAYS FROM, SERVICE IN, SERVICE OUT, CUSTODY CHANGES, and PROFILE. Below these is a green button labeled 'New Service Out+'. Underneath is a table with columns: Date Added, Picture, Type, Name, ID#, Color, Breed, Status, Location, Entered By, Partner Contact Name, and Action. The table currently displays 'No Results Found.'

Date Added	Picture	Type	Name	ID#	Color	Breed	Status	Location	Entered By	Partner Contact Name	Action
No Results Found.											

3. Click the green **New Service Out+** button.

- A list of animals appears. Find the animal in question, using the Search field if necessary.

The screenshot shows a search interface with a search bar containing 'norcal' and a magnifying glass icon. To the right are filters for Species (All), Status (All), and Location (All). Below is a table with the following data:

Photo	Date	Species	Name	Breed	Color	ID	Status	By	
	03/24/2022	Dog	A205927 NorCal Poodle Rescue	Poodle	Black	POM-A-2833	Service non POMDR	pom_cdonegan	Service Out

- Click the green **Service Out** button on the right side of the row for that animal.
- The Service Out window appears. For **Outcome Sub-type**, choose **Clinic Discharge** (which might be the only choice). For **Transfer Point of Contact**, choose whatever name appears in the list.

The 'Service Out' modal window contains the following fields:

- Outcome Sub-type:** A text input field containing 'Clinic Discharge'.
- Transfer Point of Contact*:** A dropdown menu with 'Gina Wolf' selected.

At the bottom of the window are two buttons: 'Cancel' (grey) and 'Save' (blue).

- Click the blue **Save** button. Where the green **Service Out** button was, it should now say "success". (The Status at this point might still say "Service non POMDR", but that is just a bug in the display. If you refresh the window or navigate to the dog some other way, you will see that the status is now really "Service Out".)

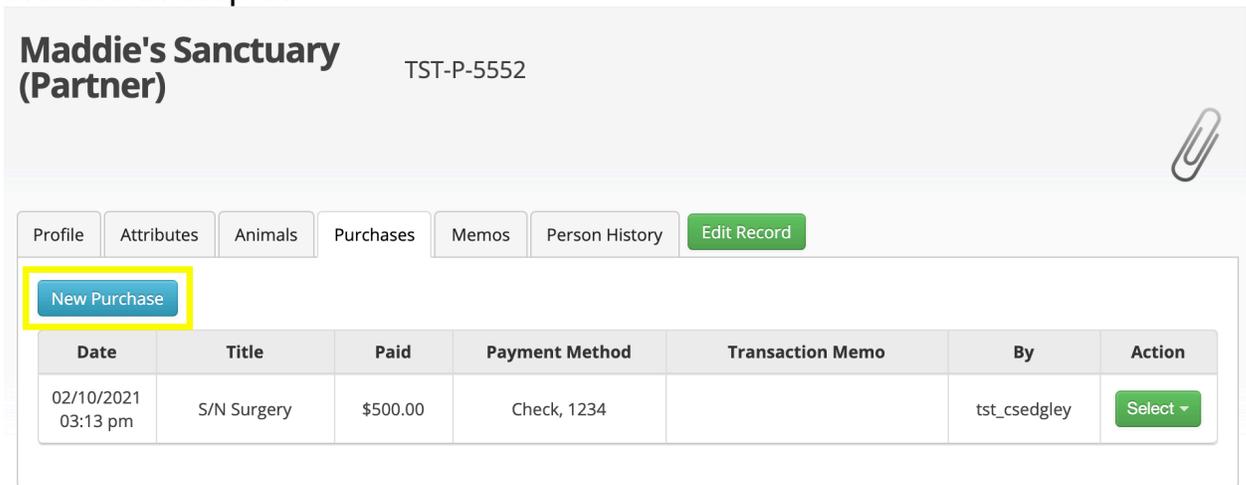
The screenshot shows the same search interface as before, but the table now has an additional column for 'success'.

Photo	Date	Species	Name	Breed	Color	ID	Status	By	success
	03/24/2022	Dog	A205927 NorCal Poodle Rescue	Poodle	Black	POM-A-2833	Service non POMDR	pom_cdonegan	success

- Note that there was no opportunity to process a payment in these steps. This is because Shelterluv doesn't currently have direct support

for payment from a partner organization. **If you're not charging the partner organization, then you are done.** If you do need to charge the partner organization, you have to now follow the workaround suggested by Shelterluv. The next few steps tell you how to do this workaround. Shelterluv's description of the workaround is here: <https://help.shelterluv.com/hc/en-us/articles/360056963711-How-do-I-create-a-transaction-for-a-Partner-organization->

9. First, there must be a Person record that represents the partner organization. Note that this is not the same as the existing Partner record which you used in step 1 (etc) above. If these steps have been followed before for this partner organization, then this Person record should already exist, otherwise you have to create it. The name of this Person record should be the exact name of the Partner record as the first name, and "(Partner)" as the last name. For example, "Hitchcock Road Animal Shelter (Partner)". So find or create this Person record now.
10. Navigate to the **Purchases** tab of the Person record that you found or created in step 9.



Maddie's Sanctuary (Partner) TST-P-5552

Profile Attributes Animals **Purchases** Memos Person History Edit Record

New Purchase

Date	Title	Paid	Payment Method	Transaction Memo	By	Action
02/10/2021 03:13 pm	S/N Surgery	\$500.00	Check, 1234		tst_csedgley	Select

11. Click the blue **New Purchase** button.
12. Now finish up the same way you would if you were charging an individual for medical treatments, as described in the section titled **How to process medical care payments/completion** starting at step 18.

Oops, I accidentally did an Intake instead of a Pre-intake!

The section above called “**How to add a non-POMDR animal to Shelterluv (for medical care)**” gives steps for telling Shelterluv about an animal that is going to receive medical care in the future. The intention is that the animal is left in a “Pre-Intake” state, so that additional info about the animal can be added to its record, but it is not listed with animals that are actually currently in POMDR’s care.

But sometimes those steps aren’t followed quite right, and you end up doing a Service Intake instead of a Pre-Intake. If this happens, the animal will be listed along with animals in POMDR’s care, with one of the “Service” statuses:

<input type="checkbox"/>	Intake	Picture	Species	Name	ID	Color	Breed	Status	Location	By
<input type="checkbox"/>	05/15/2020		Dog	Ruby	POM-A-2111	Blond	Dachshund, Miniature Long Haired	Service Staff/Board	Vet, Boand Clinic	pom_cbroecker
<input type="checkbox"/>	05/15/2020		Dog	Mac	POM-A-2110	Black	Dachshund, Miniature Long Haired	Service Staff/Board	Vet, Boand Clinic	pom_cbroecker
<input type="checkbox"/>	05/13/2020		Dog	Gumdrop	POM-A-2108	Grey	Lhasa Apso	No Rescue Groups (from shelter)	Vet, Boand Clinic	pom_azepp
<input type="checkbox"/>	05/13/2020		Dog	Gordy	POM-A-2109	Black	Pinscher, Miniature	No Rescue Groups (from shelter)	Foster Care: Kayla Gordano	pom_azepp

This section lists the steps to recover from this. In short, you do a Service Out, and just Cancel/Next through all the screens.

1. Go to the page for the person whose animal this is. One way to do this is to click on the animal's name in the list shown above, then click on History, then click on Status (if necessary), then click on the link to the Associated Person's name.

Ruby



Location: [Vet, Board Clinic](#) Staff/Board

• Service Staff/Board

Profile Processing Behavioral Medical Memos History Edit Record

Status Location Categories Visits Caretaker Profile Edits

ID	Visit	Status Name	Start Date	Start Time	By	Days Ac
POM-A-2111	POM-A-2111-1	Service Staff/Board	05/15/2020	10:44 am	pom_cb	

Associated Person

Date: **05/15/2020**

Person Name: **Kathy Henney**

Person ID: **POM-P-934**

Person Address: --

Person Phone: --

Person Email: --

2. Click the **Animals** tab.

Kathy Henney POM-P

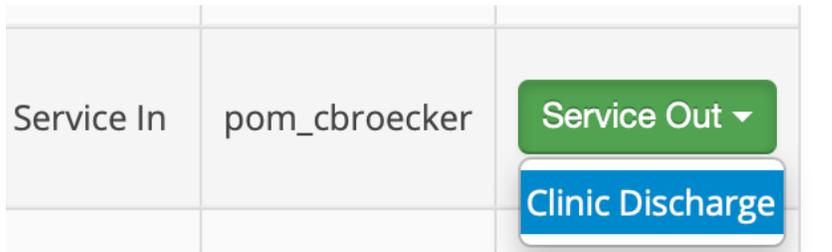
• Willing Foster

Profile Attributes **Animals** Purchases Me

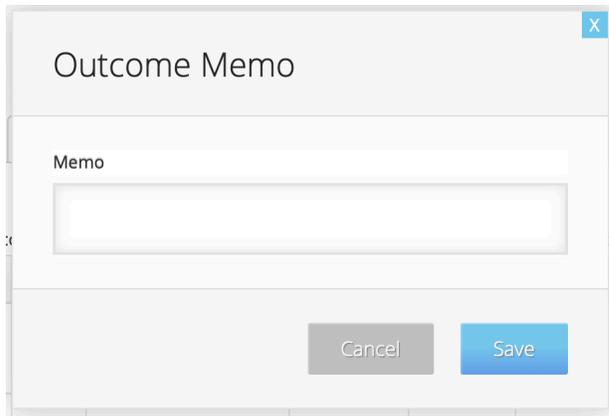
3. Click the green **Service Out** button on the line for the animal in question.

	05/15/2020	Dog	Katie	Dachshund, Miniature Long Haired	Blond/None	POM-A-2112	Service In	pom_cbroecker	
	05/15/2020	Dog	Ruby	Dachshund, Miniature Long Haired	Blond/None	POM-A-2111	Service In	pom_cbroecker	Service Out

- Choose **Clinic Discharge**. The **Service Out** button will become a **Complete Outcome** button.



- Click the **Complete Outcome** button. An **Outcome Memo** dialog will appear.



- Click **Cancel** (or **Save**, it doesn't matter). You'll see a list of possible charges.
- Click **No Charges**.

Items for Sale

✔ Person [Kathy Henney](#) has been updated

Search...

Item Number	Item Type	Item Name	Inventory	Item Price	
-	-	Donation	-	-	<input type="button" value="Add to Cart"/>
-	-	No Charge Checkout	-	-	<input type="button" value="No Charges"/>
00	Fees / Fines	Carprofen/Rimadyl/Quellin 25 mg - Each - POMDR Discount	N/A	\$0.37	<input type="button" value="Add to Cart"/>
00	Medications	Adequan Injection - POMDR Discount	N/A	\$30.00	<input type="button" value="Add to Cart"/>
00	Medications	Benzydol HCl Tab 500mg - Courtesy Discount	N/A	\$0.15	<input type="button" value="Add to Cart"/>

8. An **Add Donation** dialog will appear. Click **OK** (or click the **X** in the upper right corner, it doesn't matter which).
9. Click **Complete Transaction**.

Customer Name : [Kathy Henney](#)
 Date : 05/18/2020

ITEMS	QUANTITY	PRICE	SUBTOTAL	SPECIAL DISCOUNT
No Charge Checkout				
Sales Tax				\$ 0.00
Donation				\$ 0.00
Total Due				\$ 0.00
Payment				
<input type="text" value="No Charge Checkout"/>				
Total Paid		<input type="button" value="Donation"/>		\$ 0.00

10. An **Add Memos** button will appear. Click **Continue**.
11. A **Choose materials to provide to adopter** dialog will appear. Click **Complete**.

Choose materials to provide to adopter x

Receipt
 Email
 Print
 Don't Bother

License	None Found
Spay / Neuter details	None Found
Medical History	None Found
Rabies Vaccine Cert.	None Found
Disclaimers	None Found
Behavior Assess.	None Found

Email Address

12. A **Transaction completed!** dialog will appear. Click **OK**. This will leave you at a screen about the non-transaction that just didn't occur, but no worries, you are now done. The animal is in the system as Healthy in Home, and later you can do a Service Intake at the appropriate time.

How to see current prescriptions for a dog

All medications that POMDR’s vets prescribe are recorded in Shelterluv in a standardized way. (Note that this isn’t true for medications prescribed outside of the POMDR Board Clinic.) Follow these steps to see them:

1. Go to the dog’s record (follow the steps from “**How to find a dog’s record**” if necessary).
2. Click the Medical tab.



3. Click the Treatments tab.



A list of all currently prescribed medications will appear.

Treatment sheet

04/10/2020 04/10/2020 [View](#)

	Date	Time	Treatments	Given
<input type="checkbox"/>	04/10/2020	8:00 AM	Atenolol (25 mg atenolol tablets) (generic) 0.25 tablet PO (by mouth) twice a day	
<input type="checkbox"/>	04/10/2020	8:00 AM	Metronidazole (500 mg metronidazole tablets) (generic) 1 tablet PO (by mouth) twice a day	
<input type="checkbox"/>	04/10/2020	8:00 AM	Cerenia tablets (60 mg maropitant citrate tablets) (Zoetis) 1 tablet PO (by mouth) once a day	
<input type="checkbox"/>	04/10/2020	8:00 AM	Diphenhydramine (25 mg diphenhydramine HCl tablets) (generic) 3 tablet PO (by mouth) twice a day	
<input type="checkbox"/>	04/10/2020	8:00 AM	Carprofen (75 mg carprofen tablets) (generic) 1 tablet PO (by mouth) twice a day	
<input type="checkbox"/>	04/10/2020	4:00 PM	Atenolol (25 mg atenolol tablets) (generic) 0.25 tablet PO (by mouth) twice a day	
<input type="checkbox"/>	04/10/2020	4:00 PM	Metronidazole (500 mg metronidazole tablets) (generic) 1 tablet PO (by mouth) twice a day	
<input type="checkbox"/>	04/10/2020	4:00 PM	Diphenhydramine (25 mg diphenhydramine HCl tablets) (generic) 3 tablet PO (by mouth) twice a day	
<input type="checkbox"/>	04/10/2020	4:00 PM	Carprofen (75 mg carprofen tablets) (generic) 1 tablet PO (by mouth) twice a day	

How to find past records of medical care payments

Medical care payments for Staff/Board/Volunteers animals, Helping Paw animals, sponsored animals, etc. are normally dealt with by following the steps in the section called **How to process medical care payments**. But occasionally you might want to go back and see this payment info later on. Here are the steps to do that.

1. Go to the record of the person who made the payment (e.g., the staff member or the Helping Paw client).
2. Click the **Purchases** tab. The list of past payments will appear here.