

ShelterBuddy Status and Reporting Recommendations

ShelterBuddy status based reporting that shows LOS in a specific status

- There are three reports we can recommend for this:
 - Animal Care Days - Summary (Report 11) provides the average “days at X status” broken down by animal type, breed, and intake source.
 - Animal Care Days - Detailed (Report 735) provides a detailed list of each animal ID and the number of days of each status within an indicated timeframe.
 - Length Between 2 Statuses (Report 614) can be helpful if a customer wants to look at the average number of days between two specific statuses, broken down by animal type.

ShelterBuddy status fields customization

- While customers cannot directly edit the list of Statuses, we can disable Statuses for each customer in order to customize and simplify the list of visible Statuses in the drop-down.
- More importantly, the Sub-Status field is completely customizable, and can be quite powerful, since an animal can have multiple sub-statuses assigned at a time.

Specific recommendations for Shelterbuddy users for statuses/sub statuses and their uses

- While we do provide a list of definitions of ShelterBuddy Statuses there is not a true one-size-fits-all set of recommendations we provide. Generally, the guidance we provide customers regarding statuses/sub-statuses is based on three primary considerations:
 - What animal records do customers need to appear on third-party pet listing websites?
 - What is the simplest way to translate their animal's population and pathway management into the available statuses?
 - What data is important to them for identifying opportunities to improve processes?
- Based upon the answers to those questions, we will disable any unused statuses to simplify the customer's list to choose from, and then work on building out the Sub-Statuses they will need.
- Regarding Sub-Statuses and reports, it's important to note that our LOS reports previously mentioned do not include Sub-Statuses, relying only on Statuses. So, if a customer wants to track average LOS at specific stages in their outcome pathways, we would coach the use of primary Statuses for those stages - and then use Sub-Statuses to help support more granular population management.

Recommended Reporting for ShelterBuddy users to track their animal population in days in care and then big picture wise LOS

- For tracking big picture LOS:
 - Total Length of Stay (Report 272) OR Total Length of Stay by Region (Report 690)
- For day-to-day population management:
 - In Care Inventory (Report 226) - This includes *Days In Care* and *Days at Current Status* fields for each in-care animal. Customers can also enable this report to be emailed out to users at customizable intervals.
- Shoutout to the previously mentioned reports more focused on Status LOS:
 - 735 Animal Care Days - Detailed
 - 11 Animal Care Days - Summary
 - 614 Length Between 2 Statuses

Recommendations for medical animals to ensure they don't fall through the cracks under a generic medical status or while they are under medical care

- There are a variety of tools that can be used to ensure animals with medical needs aren't getting lost in the outcome pathways.
 - Sub-Statuses: Since multiple sub-statuses can be applied at the same time, they can help provide a more detailed indication of the animal's broad “status” and can be used in a way to identify important next steps for moving that animal to the next stage in the pathway flow.
 - Animal Tasks: Customers can create Task List based on Categories (including Medical) that can then be assigned to animal records with specific due dates. ShelterBuddy's medication tracking is built off the Animal Task functionality, and it can be customized beyond medications to expand to other medical-related tasks.
 - Speaking of medications, we do have a Med Buddy smartphone app that can make tracking medication administration easier.

- Treatments and Scheduled Consultations: The **Vet Treatments Due (7)** report and **Vet Reminder Report (96)** are both useful as daily reports to see which animals are scheduled for treatments/vet visits on specific days.
- Scheduling Module: We do offer a Scheduling Module that can also be useful in this regard, especially for animals in foster care that may be arriving at the clinic at specific times.

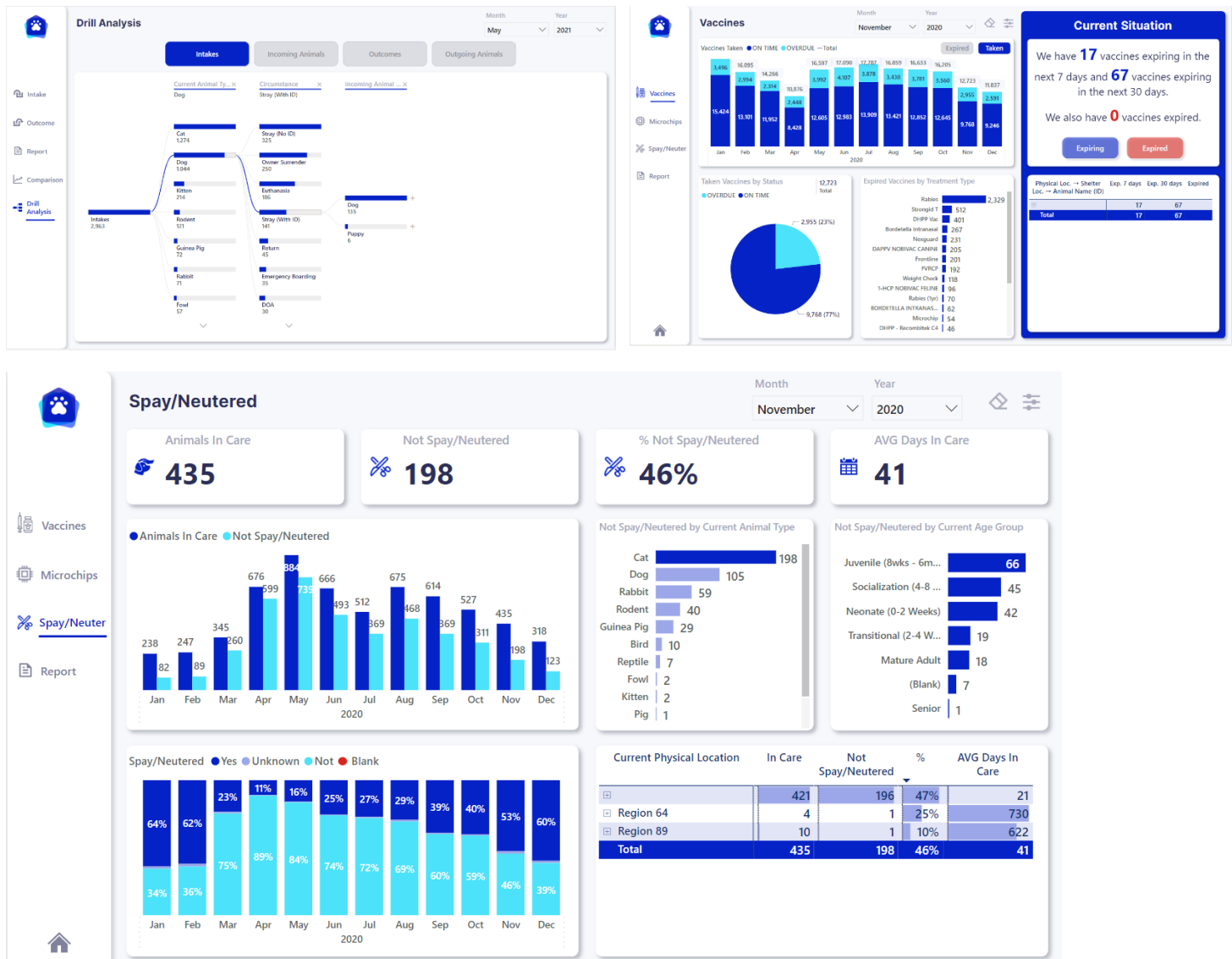
Other recommendations for assisting organizations with really looking at their population and processes to make data driven decisions.

- We are always excited to work with our clients to answer questions and brainstorm on ways the to improve the use of the ShelterBuddy database.
- *Alternative/Specialized Placement* field to designate Placement Pathways to track efficiency within each pathway.
- We also have a Knowledge Base accessible to clients that documents all of ShelterBuddy's functionality.
- We also offer an integrated Power BI sandbox for clients that wish to build dashboards and reports in addition to the hundreds of canned reports. At the bottom of the document are a few screenshots of reports we have created using Power BI.

Reaching out to ShelterBuddy

- The best way to reach out is to email support@shelterbuddy.com. Often we can answer via email but are happy to setup an live call if necessary.

Power BI Dashboard Examples:



PetPoint Stage and Reporting Recommendations

PetPoint stage based reporting that shows LOS in a specific stage

- Recommended Reports:
 - Stage: Length of Stay (Also available in Age/Species CrossTab)
 - Stage: With Result Extended
 - Stage: Days

PetPoint Stage field customization

- While there are some PetPoint Stage fields that can't be edited, such as Evaluate and Available, the stage field is completely customizable which can be completed by the admin of the database.

Specific recommendations for PetPoint users for stages and their uses

- There is a list of generic stages that can be provided by support.
- Support can also work one on one with organizations to help them determine the best steps for their specific processes regarding stages.
- On top of stages, there is a "Medical Status", "Temperament Status" and "Animal Condition" fields that can be customized and used with the animal's stage to show where they are in the process.
- Using Review dates on your stages with the minimal amount of time you want in those stages so you can keep a pulse on the animals in your care and help with LOS. Report: Stage Review can give you a report on this.

Recommended Reporting for PetPoint users to track their animal population in days in care and then big picture wise LOS

- **Animal: Length of Stay Report by Outcome Age-Species Crosstab**
Description: This report generates a table which shows animals' length of stay based on their outcome type during the select date range.
- **Animal: Length of Stay Report**
Description: This report displays the length of stay for animals based on breed, color intake, or outcome types.
- **Animal: Care Days Age-Species Crosstab**
Description: Counts animal care days during a selected date range, broken down based on available selections. This report generates a table of Length of Stay Days based on selected values.
- [PetPoint Animal Length of Stay Report - Description and Details.docx](#)

Recommendations for medical animals to ensure they don't fall through the cracks under a generic medical stage or while they are under medical care

- Utilizing Medical Stages and Medical Status fields to show where they are under treatment
- Scheduling out Medical Items: Tasks, Procedures, Surgeries, Exams, Vaccinations and Medications.
- Utilizing Review Dates on your exams and surgeries for next steps for those animals.

Other recommendations for assisting organizations with really looking at their population and processes to make data driven decisions. *Be logged into PetPoint to see the below links.*

- Utilizing Location View Report for animal inventory management:
<https://pethealth.force.com/community/s/article/Location-View-Report>
- Company Activity Crosstab Report, Great for daily management reporting
- Favorite Reports: <https://pethealth.force.com/community/s/article/Video-Our-Favorite-Reports>

Reaching out to PetPoint

- Submit a ticket under Support> Contact Us on your menu.
<https://pethealth.force.com/community/s/contactsupport>

ShelterLuv Status and Reporting Recommendations

ShelterLuv status based reporting that shows LOS in a specific status

- [Here is our Best Practices for Configuring Statuses Help Center article](#)
- [We also have a Status and Attribute Overview video](#)
- Some of the reports organizations could run would be: Our Animal Population = currently in custody quick report, Length of Stay report, or an org could run a custom report on specific statuses. [These are all of our Quick Report options](#)

ShelterLuv status fields customization

- ShelterLuv Status fields are customizable.

Specific recommendations for Shelterluv users for statuses/sub statuses and their uses

- See above article. We also have [suggested configurations](#) that have some statuses built out that organizations can pick from.

Recommended Reporting for ShelterLuv users to track their animal population in days in care and then big picture wise LOS

- Length of Stay quick report and organizations could also run a custom report depending on what data points they are looking for.

Recommendations for medical animals to ensure they don't fall through the cracks under a generic medical status or while they are under medical care

- Yes, we would recommend organizations create specific medical statuses and attributes to make animals in medical care. Organizations can also use pop-up memos on an animal record to flag important information.

Other recommendations for assisting organizations with really looking at their population and processes to make data driven decisions.

- Depending on what data points an organization is looking for. Between all of our quick reports and custom reporting options, an organization can make informed data-driven decisions.

Reaching out to ShelterLuv

- Customer Solutions team at help@shelterluv.com.

Length of Stay

Run Byxyz_sarah

Report Run01/09/23 12:12 pm

Date Start08/01/2022

Date End10/31/2022

Print

Excel

?

This report is designed to help you review the length of stay of your animals in custody during a selected period.

This report is built by:

1. Producing one row per animal visit during the selected time period.
2. Displaying each visit for an animal as a separate row, if an animal has multiple visits in the selected time period.
3. Displaying overall averages for days in custody, days on site, and days available.
4. Excluding animals with an intake AND outcome subtype set to "count towards intake/outcome numbers = No."
5. Excluding in-custody animals with an intake subtype set to "count towards intake/outcome numbers = No."
6. Giving the option to:
 1. Show all animals currently in custody.
 2. Show animals that had an outcome during the selected period.
 3. Show animals that had an intake during the selected period.
 4. Show number of days animals were in care during the selected period.

☒ Show the current length of stay for all animals currently in custody

☐ Only show visits with an outcome during the date range(outcome-based)

☐ Only show visits with an intake during the date range (intake based)

☐ Only show days within during the date range (care-day based)

49 Records

Search

Species	Included Visits	Excluded Visits	Average Days In Custody	Average Days On Site	Average Days Available
Dog	24	1136	943	547	
Cat	24	1331	1281	603	
Chicken, Domestic	1	781	781	781	

Frequency

200

0

200

400

600

800

1000

1200

1400

1600

1800

Days

Animal Population

Run Byxyz_sarah

Report Run01/09/23 12:14 pm

Date Start01/09/2023

Date End01/09/2023

Print

Excel

?

This report is designed to help you review the animals currently in your custody (at the time the report is run), including both in shelter and in foster.

This report is built by:

1. Producing one row per animal currently in your custody at the time the report was run.
2. Giving the option to exclude animals that:
 1. Are not available for adoption.
 2. Are in a status that is considered "off site" (foster animals, for example).
 3. Have a photo

☒ show available animals only

☐ show on-site animals only

☐ show only animals with no photo

17 Records

Animal ID	Name	Species	Primary Breed	Secondary Breed	Sex	Altered	Location	Attributes	Days in Custody	Days on Site	Days Available	Status
XYZ-A-2	Carl the Pug	Dog	Pug		Male	Yes	Wood Wood Drive	Good with cats, Good with dogs, Heartworm Positive, Joint injuries, Single Dog Home, Special Dietary Needs	1212	1212	500	Available for Ac
XYZ-A-27	Clifford	Dog	Bullmastiff		Male	Yes	Dog Kennels	Good with dogs, Special Dietary needs, Working with behavior team	732	732	148	Available for Ac
XYZ-A-103	Garfield	Cat	American Bobtail	Domestic Shorthair	Male	Yes	Wood Wood Drive	Indoor Only, Lap Cat, Purr Monster, Spay/Neuter, Deposit Forfeit Date	1343	1343	1343	Available for Ac

Chameleon Status and Reporting Recommendations

Chameleon status fields customization

- The majority of Chameleon's fields are customizable. It is recommended that you work directly with the support team for them to assist with ensuring the reporting and data needs are met for your organization. The Chameleon support team can assist you with how the system can best work for your organization's specific processes and animal flow needs.

Reporting for Chameleon

- It is recommended that organizations work directly with Chameleon for their reporting needs. Custom reports can be created to ensure that the organization can make data driven decisions based on their processes.
- An example of custom reports for population management:

Animals in need of action (Behavior, Adoption, Medical)





10/2/2014





Outcome Statuses					
	ADOP	EUTH	TRAN	Total	
BIRD	0	0	4	4	
CAT	9	0	9	18	
DOG	20	7	8	35	
OTHER	1	0	0	1	
Total	30	7	21	58	

Medical Exam Status (Currently)					
	FAIL	PASS	RE-EVAL	Total	
BIRD	0	4	0	4	
CAT	0	12	5	17	
DOG	2	27	10	39	
OTHER	0	0	1	1	
Total	2	43	16	61	

Overall Status			Total
	READY		
BIRD	3	1	4
CAT	18	0	18
DOG	28	10	38
OTHER	1	0	1
Total	50	11	61

Behavior Exam Status (Currently)			Total
	PASS		
BIRD	3	1	4
CAT	18	0	18
DOG	25	14	39
OTHER	1	0	1
Total	47	15	62

	AC 201 A223956 TRANSFR IN - 09/18/2014 DOMESTIC SH PASS Days post due out date: 12 Status: STRAY WAIT	Medical: PASS - 10/1/14 Behavior: none Pre-Outcome: Holds:
	AC 201 A223958 TRANSFR IN - 09/18/2014 DOMESTIC MH PASS Days post due out date: 12 Status: STRAY WAIT	Medical: PASS - 10/1/14 Behavior: none Pre-Outcome: Holds:
	AC 203 A223951 TRANSFR IN - 09/18/2014 DOMESTIC SH PASS Days post due out date: 12 Status: STRAY WAIT	Medical: PASS - 10/1/14 Behavior: none Pre-Outcome: Holds:
	C 205 A223954 TRANSFR IN - 09/18/2014 SIAMESE PASS Days post due out date: 12 Status: UNAVAIL	Medical: PASS - 9/26/14 Behavior: none Pre-Outcome: Holds:

	A01 Griffon - A023903 - 2Y old,M, Black,Germ Shepherd Intake Date:11/10/16 Intake Type:OWNER SUR Due Out: 11/10/2016 12:07:00PM Adjust. Due Out:11/10/2016 12:07:00PM Pre-Outcome - TRANSFER - SPCA	Medical: No Beh.: No Tag3:	No Photo 12:07:00 PM
	A01 Sylvester - A024565 - 8Y old,M, Black / White,Domestic Sh Intake Date:5/21/09 Intake Type:OWNER SUR Due Out: 5/21/2009 3:07:00PM Adjust. Due Out:5/21/2009 3:07:00PM Pre-Outcome - TRANSFER - SPCA	Medical: No Beh.: No Tag3:	
	C04 C042 Paris - A024585 - 13Y old,S, White / Brn Tabby,Domestic Sh Intake Date:5/22/09 Intake Type:OWNER SUR Due Out: 5/22/2009 11:20:00AM Adjust. Due Out:5/22/2009 11:20:00AM	Medical: No Beh.: No Tag3:	
	CAD CADOPT Miss Shady - A014357 - 9Y old,S, Black,Domestic Mh Intake Date:5/13/09 Intake Type:RETURN Due Out: 5/13/2009 11:32:00AM Adjust. Due Out:5/13/2009 11:32:00AM Pre-Outcome - FOSTER - URI	Medical: No Beh.: No Tag3:	

Reaching out to Chameleon

- Reach out to Support at support@chameleonbeach.com.