

# 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.
- [Best Practices Requesting a Medical Exam.docx](#)
- [Best Practices Medical How do I see my 'to do' list 8 2020.docx](#)

## **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>

## **Recommendations for reporting on Available Animals for pathway planning:**

- Animal Inventory Memo report because it allows you to use filters to determine if animals in the stage of Available are missing their Petango Adoption Description as well as includes filters for photos and videos. You can then use the report to ensure all of your Available animals have all of the information to help promote them for adoption.

### Reporting for Animals in Foster Care:

- [Foster Reporting Ideas](#)

### Reporting for Animal Behavior:

- [Best Practices Requesting a Behavior Test](#)
- [Best Practice - Behavior Modification Tracking.docx](#)

### Recommendations for General Pathway Reporting:

- There is tremendous power in the search options in the Information Center in PetPoint 6. Since the search is defaulted to show Active animals, organizations can easily use the filters on the Animal tab to help determine where each animal is in the process based on Stage, Spay/Neuter status, Location, custom Pet ID Types, etc. They can then update records to move the animals along as needed.
- Using Default Review Dates. Each stage can have its own Default Review Date (added in Admin Options > Add/Edit Field Value > Animal Stage). It is recommended that organizations add a default for all stages that is the maximum amount of time that they would want an animal in that stage before it triggers a review of the record. So for some stages that might only be 1 day and for others it could be weeks. The user can change this date for special circumstances, but adding a default ensures that a date is included each time a stage is added or changed. They can then use the Animal: Stage Review report to see animals who have been in stages for longer than they anticipated. This triggers them to perform a review of the animal's record to either change the stage and move the animal along or extend the review date if the animal has a reason to remain in their current stage.

### Reaching out to PetPoint

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