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](https://pethealth.force.com/community/s/article/Video-Our-Favorite-Reports)

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.**

- Company Activity Crosstab Report, Great for daily management reporting

Reaching out to PetPoint

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

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