SAC ANIMAL LEVEL DATA SOPS

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Purpose of Animal Level Data (ALD) SOPs

Shelter Animals Count is the trusted source for collecting and sharing credible and accessible data to positively impact animals and communities. Standardized data and data collection processes are mechanisms to ensure consistency and reliability in the information gathered, enabling SAC to provide national insights. This document outlines best practices for recording data on animal attributes and intake types in an SMS (Shelter Management Software) or other animal data collection method as used by animal welfare organizations.

Each data point in this document will generally follow the standardized structure outlined below to ensure consistency and clarity:

1. Purpose
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Contributors

The following are contributors of this document: Shelter Animals Count Data Education Coordinator, Shelter Animals Count Director of Data and Technology, Animal Level Data Committee, Animal Level Data Focus Group Participants, Shelter Animals Count Board of Directors.

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Data Entry for Age Group Assignment

Publication Date: March 1, 2025

Purpose

Shelter Animals Count (SAC) is the trusted source for collecting and sharing credible and accessible data to positively impact animals and communities. Standardized data and data collection processes are mechanisms to ensure consistency and reliability in the information gathered, enabling Shelter Animals Count to provide national insights. This document outlines how Shelter Animals Count assigns age groups based on the ages of dogs and cats within an SMS (Shelter Management Software) or other animal data collection method. An age group includes dogs and cats falling within specific age ranges. Below are the standard age groups that Shelter Animals Count will employ for any age-related analyses.

Standard Values 1

Neonate ≤ 4 weeks

Weaned > 4 weeks and ≤ 8 weeks

Juvenile >8 weeks and ≤ 5 months

Adult >5 months and ≤ 7 years

Senior > 7 years

Objective

The objective of establishing a data entry SOP for age groups is to increase the accuracy of recorded age groups by confirming that assigned age groups correspond to the recorded age and date of birth.

Scope

The SOP covers the documentation and analysis of an animal's current age group or the age group of the animal at the time of their outcome.

Best Practices

- Refer to *General Data Entry SOP for Date of Birth* for guidance on recording an animal's date of birth. Date of birth data will be utilized by SAC to assign an age grouping.
- Verify the accuracy of the populated age group data by cross-checking with the recorded age.

References

- [View of The Guidelines for Standards of Care in Animal Shelters (jsmcah.org)](jsmcah.org)
  - *Section 1.5 (pg 7), 6.3 (pg 30), 7.2 (pg 38)*
- [Performing a physical exam on a shelter animal | Resources | Koret Shelter Medicine Program](#)

Data Entry for Altered Status

Publication Date: March 1, 2025

Purpose

Shelter Animals Count is the trusted source for collecting and sharing credible and accessible data to positively impact animals and communities. Standardized data and data collection processes are mechanisms to ensure consistency and reliability in the information gathered, enabling SAC to provide national insights. This document outlines data entry best practices for organization staff to record data on the altered status of animals in an SMS or other animal data collection method. The altered status indicates whether an animal is currently spayed or neutered and is categorized into the following standard values.

Standard Values

Yes Animal is altered

No Animal is not altered

Unkown Animal has unknown alteration status

Objective

The goal of establishing a data entry best practice for **altered status** is to increase the number of animal records with known altered statuses (Altered Status= 'Yes' or 'No').

Scope

- Used when medical staff conduct intake exams or when intake staff are trained by a veterinary professional to perform physical or visual exams.
- Applies to all shelter staff responsible for recording and updating animal altered status in an SMS or similar data managment system.
- Involves documenting whether an animal is spayed, neutered, or has an unknown status.
- Specifically applied when recording data for dogs and cats.
- Relevant during an animal's initial intake, medical examination, and subsequent record updates.
- If an animal's behavior, physical condition, or age hinders determining its reproductive status, record its status as "Unknown" until clarified.

Best Practices

- Train staff on how to estimate an animal's altered status based on a physical examination.

- All animals should receive a comprehensive physical exam by a veterinarian or trained medical staff within 24 hours of intake[1].
    - For organizations without internal medical support, this may not be attainable; however, it is still strongly recommended that the animal be evaluated by a veterinarian at least once while under the organization's care prior to their final outcome.
- Record the animal's altered status in the data management system upon intake.
- Check and update the recorded altered status in the data management system regularly as more details emerge.
- Reevaluate the animal's altered status during medical check-ups and adjust in the **SMS** or data management system.
- Document the reason for any changes in the animal's altered status in their medical notes.
- Keep the method of recording altered status consistent across all shelter records.

Responsibilities

- **Data Entry Team:** Any staff that records data at the time of intake or during an animal's time in the organization's custody.
    - **Intake Staff**
        - Record an animal's altered status at the time of intake.
        - Record any updates to the animal's altered status.
    - **Medical Staff**
        - Record an animal's altered status at the time of intake exam.
        - Record any updates to the animal's altered status.
    - **Data Entry Supervisor**
        - Implement measures to make altered status data entry mandatory and restrict the user's choices to a standard list.
        - Perform audits of altered status data to ensure compliance with Best Practices.

Procedure
Software Preparation (Data Entry Supervisor)

a. These will be entirely dependent on the software provider.

b. All altered status related fields are configured as required (if applicable).

c. Ensure that the list of choices for users is restricted to the standard values (if applicable).

    i. Yes

    ii. No

    iii. Unknown

d. Automate all altered status fields to update when a spay/neuter surgery is entered into the animal's record (if applicable).

Organizations with Internal Medical Support

Recording Altered Status at Intake (Data Entry Team)

- Intake Type= Relinquished by Owner or Transfer In.

  - If an owner or originating shelter provides documentation of the animal's altered status, enter the altered status exactly as it appears on the provided documentation.

  - A physical exam should be performed by the external medical resource to confirm the reported status.

- Intake Type = Born in Care.

  - Set altered status to "No".

- Set the altered status field to "Unknown" for all other scenarios.

Updating Altered Status from a Medical Exam (Medical Staff)

- Internal or External medical staff should perform a physical exam.

- If the results of the physical exam confirm the recorded altered status, no action is needed.

- If the results of the physical exam indicate a different altered status, update the altered status in the SMS or other data management system.

- Document the reason for the change the animal's medical notes.

Monitoring and Evaluation

- Establish a baseline measurement of altered status data that is outside of the SOP guidelines.

- Regularly audit data entry practices to ensure alignment with SOP guidelines.

- Employ data quality checks within the system to identify and address inconsistencies.

- Assess the effectiveness of staff training programs regarding altered status recording accuracy.

References

- View of The Guidelines for Standards of Care in Animal Shelters (jsmcah.org)
  - *Section 1.5 (pg 7), 6.3 (pg 30), 7.2 (pg 38)*

- Performing a physical exam on a shelter animal | Resources | Koret Shelter Medicine Program

Data Entry for Date of Birth

Publication Date: March 1, 2025

Purpose

Shelter Animals Count is the trusted source for collecting and sharing credible and accessible data to positively impact animals and communities. Standardized data and data collection processes are mechanisms to ensure consistency and reliability in the information gathered, enabling SAC to provide national insights. This document outlines data entry best practices for shelter staff to record data on the date of birth of animals in an SMS or other animal data collection method.

The date of birth indicates the exact or best estimate of the day, month, and year an animal was born and is restricted by the following parameters.

Standard Values

- Dates of birth must include the day, month, and year.
- Dates of birth must be either the present date or a date in the past.

Objective

The objective of establishing a data entry best practice for date of birth is to enhance the collection of accurate and known age data. This increased collection will not only allow for further analysis of national trends based on an animal's age while in the animal sheltering system but also enable the examination of the distribution of births throughout the year, aiding in understanding seasonal variations in intakes and outcomes.

Scope

- Used when medical staff conduct intake exams or when intake staff are trained by a veterinary professional to perform physical or visual exams.
- Applies to all shelter staff responsible for recording and updating animal date of birth in an SMS or similar data collection system.
- Involves documenting an animal's exact or estimated date of birth.
- Specifically applied when recording data for dogs and cats.
- Relevant during an animal's initial intake, medical examination, and subsequent record updates.
- If an animal's behavior or physical condition hinders the ability to determine its date of birth, leave the date of birth field blank until a more accurate estimate can be made.

Best Practices

- Train staff on how to estimate an animal's age based on its appearance and behavior.

- All animals should receive a comprehensive physical exam by a veterinarian or trained medical staff within 24 hours of intake.
  - For organizations without internal medical support, this may not be attainable; however, it is still strongly recommended that the animal be evaluated by a veterinarian at least once while under the organization's care prior to their final outcome.
- Record the animal's date of birth (or estimated date) in the data managment system when it enters the organization's care.
- Check and update the recorded date of birth in the data management system regularly as more details emerge or the animal's age becomes clearer.
- Reevaluate the animal's age during medical check-ups and adjust the recorded date of birth as necessary in the SMS or data management system.
- Document the reason for any changes in the animal's date of birth in their medical notes.
- Keep the method of recording date of birth consistent across all shelter records.

Responsibilities

- **Data Entry Team:** Any staff that records data at the time of intake or during an animal's time in the organization's custody.
  - **Intake Staff**
    - Record an animal's date of birth at the time of intake.
    - Record any updates to the date of birth.
  - **Medical Staff**
    - Record an animal's date of birth at the time of intake exam.
    - Record any updates to the date of birth.
  - **Data Entry Supervisor**
    - Implement all possible measures to make date of birth data entry mandatory and restrict the user's choices to a standard format.
    - Perform audits of data to ensure compliance with best practices and standard parameters.

Implementation Guidelines

Software Preparation (Data Entry Supervisor)

- Specific steps will be entirely dependent on your chosen data management system.
- Date of birth must be configured as a required field (if applicable).
- Ensure that users are restricted to entering values that follow the standard parameters (if applicable).
  - Dates of birth must include the day, month, and year.
  - Dates of birth can either be the present date or any date in the past.

Organizations with Internal Medical Support
Recording Date of Birth at Intake (Data Entry Team)

- Intake Type= Stray.
  - Perform a brief physical exam.
  - Enter a date of birth based on the findings of the physical examination.
- Intake Type= Relinquished by Owner or Transfer In.
  - If an owner or originating shelter provides documentation of the animal's date of birth, enter the date of birth exactly as it appears on the provided documentation.
  - A physical exam should be performed to confirm the reported date of birth.
- Intake Type=Born in Care.
  - If an animal is born in the organization's care enter the animal's associated date of birth.

Organizations with External Medical Support
Recording Date of Birth at Intake (Data Entry Team)

- Intake Type= Relinquished by Owner or Transfer In.
  - If an owner or originating shelter provides documentation of the animal's date of birth, enter the date exactly as it appears on the provided documentation.
  - A physical exam should be performed by medical staff to confirm the reported status.
- Intake Type = Born in Care.
  - If an animal is born in the organization's care enter the animal's associated date of birth.
- Leave the date of birth field blank for all other scenarios.

Updating Date of Birth from a Medical Exam (Medical Staff)

- Perform a physical exam.
- If the results of the physical exam confirm the existing date of birth, no action is needed.
- If the results of the physical exam yield a new date of birth enter the updated date of birth into the SMS or other data management system.
  - Document the reason for the change of their medical notes.

Monitoring and Evaluation

- Establish a baseline measurement of date of birth data that is outside of the SOP guidelines.
- Regularly audit data entry practices to ensure alignment with SOP guidelines.
- Employ data quality checks within the system to identify and address inconsistencies.
- Assess the effectiveness of staff training programs regarding age estimation and birth date recording accuracy.

References

- View of The Guidelines for Standards of Care in Animal Shelters (jsmcah.org)
  - *Section 1.5 (pg 7), 6.3 (pg 30), 7.2 (pg 38)*

- Performing a physical exam on a shelter animal | Resources | Koret Shelter Medicine Program
  - How to Determine a Cat's or Dog's Age

Data Entry for Size Group Assignment

Publication Date: March 1, 2025

Purpose

Shelter Animals Count (SAC) is the trusted source for collecting and sharing credible and accessible data to positively impact animals and communities. Standardized data and data collection processes ensure consistency and reliability in the information gathered, enabling SAC to provide national insights. This document outlines how SAC assigns size groups based on the estimated full-grown weights of dogs and cats within a Shelter Management Software (SMS) or other animal data collection methods. A size group includes dogs and cats falling within specific estimated weight ranges. Below are the standard size groups that SAC will employ for any size-related analyses.

Standard Values

Small ≤ 25 lbs
Medium > 25 lbs and ≤ 60 lbs
Large >60 lbs and ≤ 100 lbs
Extra Large > 100 lbs

Objective

The objective of establishing a data entry SOP for size groups is to increase the accuracy of recorded size groups by ensuring they are assigned based on the estimated full-grown weight of the animal, aligned with the standardized size group classifications recommended by SAC.

Scope

- Outlines procedures for analyzing and categorizing the size of dogs and cats based on their estimated adult weight.

- Provides a framework for determining size classifications using standardized weight groupings.

Best Practices

- Refer to the **Data Entry SOP for Weight** for guidance on recording an animal's weight at intake and throughout its stay. Weight data at these stages will inform the estimated full-grown weight for size group assignment.

- Assign size groups based on SAC's recommended size groupings, using the estimated adult weight of the animal as the primary factor.

- Verify the accuracy of the size group data by cross-checking with recorded weight data and estimated growth patterns. When estimating growth patterns, consult with a veterinarian to ensure accurate predictions of an animal's adult size. Adjustments may be needed as new information about the animal's weight becomes available during their stay.

References

- Performing a physical exam on a shelter animal | Resources | Koret Shelter Medicine Program
  - Adopt A Pet Search Filters

Data Entry for Weight

Publication Date: March 1, 2025

Purpose

Shelter Animals Count is the trusted source for collecting and sharing credible and accessible data to positively impact animals and communities. Standardized data and data collection processes are mechanisms to ensure consistency and reliability in the information gathered, enabling SAC to provide national insights. This document outlines data entry best practices for shelter staff to record data on the weight of animals in an SMS or other animal data collection method.

The weight field indicates the most recently recorded weight of an animal in a chosen unit (grams, ounces or pounds) is restricted by the following parameters.

Standard Parameters

- Weight must be a positive value greater than zero.

Objective

The objective of establishing a data entry best practice for weight is to enhance the collection of accurate and known weight data. This will support more comprehensive analysis of national trends related to an animal's weight in the sheltering system and provide insights into how estimated size, based on weight, influences intakes, outcomes, and other factors impacting their experience within the shelter system.

Scope

- Used when medical staff conduct intake exams or when intake staff are trained by a veterinary professional to perform physical or visual exams.
- Applies to all shelter staff responsible for recording and updating animal weight in an SMS or similar data management system.
- Involves documenting an animal's exact or estimated weight.
- Relevant during an animal's initial intake, medical examination, and subsequent record updates.
- If an animal's behavior or physical condition hinders the ability to determine its weight, leave the weight field blank until a more accurate estimate can be made..

Best Practices

- All animals should receive a comprehensive physical exam by a veterinarian or trained medical staff within 24 hours of intake[1].
  - For organizations without internal medical support, this may not be attainable; however, it is still strongly recommended that the animal be evaluated by a veterinarian at least once while under the organization's care prior to their final outcome.
- Record the animal's weight (or estimated weight) in the data managment system when it enters the organization's care.
- Check and update the recorded weight in the data management system regularly.

- Document the reason for any significant changes in the animal's weight in their medical notes.
- Ensure that the units are consistent when entering weight data. If you measured the weight in a specific unit, either change the unit in the system or convert the weight to the unit accepted by the data management system.

Responsibilities

Data Entry Team: Any staff that records data at the time of intake or during an animal's time in the organization's custody.

- **Intake Staff**
  - Record an animal's weight at the time of intake.
  - Record any updates to the weight.
- **Medical Staff**
  - Record an animal's weight at the time of intake exam.
  - Record any updates to the weight.
- **Data Entry Supervisor**
  - Implement all possible measures to make weight data entry mandatory and restrict the user's choices to a standard format.
  - Perform audits of data to ensure compliance with best practices and standard parameters.

Implementation Guidelines

Software Preparation (Data Entry Supervisor)

- Specific steps will be entirely dependent on your chosen data management system.
- Weight must be configured as a required field (if applicable).
- Ensure that users are restricted to entering values that follow the standard parameters (if applicable).
  - Weight must be a positive value greater than zero.

Organizations with Internal Medical Support

Recording Weight at Intake (Medical Staff)

- Medical staff should record the animal's weight during the intake exam, following standard medical protocols.
  - Ensure that the weight is entered accurately and with the correct unit into the data management system immediately after the exam.

Organizations with External Medical Support

Recording Weight at Intake (Data Entry Team)

- Tips for Accurately Recording Weight.

  - Use the Correct Scale: Use an appropriately sized scale for the animal. Neonates should be weighed on scales that measure in smaller units (grams or ounces) for greater accuracy.

  - Ensure Proper Positioning: Make sure the animal is fully on the scale with all body parts.

  - Weighing Behaviorally Challenging Animals:

    - Ask your external medical provider to record a weight for the animal while under anesthesia if they are undergoing a procedure.

    - Weigh the animal inside a trap or kennel with a known weight. Subtract the container's weight to calculate the accurate weight of the animal. Ensure the entire container surface is on the scale for precise measurement.

Recording Weight at Intake (Data Entry Team)

- After the animal undergoes any medical exam, ensure that any significant weight change is documented in the medical notes and updated in the system.

Monitoring and Evaluation

- Establish a baseline measurement of weight data that is outside of the SOP guidelines.
- Regularly audit data entry practices to ensure alignment with SOP guidelines.
- Employ data quality checks within the system to identify and address inconsistencies.
- Assess the effectiveness of staff training programs regarding age estimation and birth date recording accuracy.

References

- [1] View of The Guidelines for Standards of Care in Animal Shelters (jsmcah.org)

  - *Section 1.5 (pg 7), 6.3 (pg 30), 7.2 (pg 38)*

- Performing a physical exam on a shelter animal | Resources | Koret Shelter Medicine Program

- Weights and Measures AKC

Data Entry for Relinquished by Owner Intake Subtype

Publication Date: March 1, 2025

Purpose

Shelter Animals Count is the trusted source for collecting and sharing credible and accessible data to positively impact animals and communities. Standardized data and data collection processes ensure consistency and reliability in the information gathered, enabling SAC to provide national insights. This document outlines data entry best practices for shelter staff to record subtype data on Owner Relinquished aka Owner Surrender intake type in an SMS or other animal data collection method.

The intake type (e.g. Owner Relinquished) provides the primary and most general description of how the animal came into the organization's custody. This intake type also indicates what process the organization may follow during the intake period. For example, does the animal require a holding period, etc. The intake subtype offers additional information for that specific animal and intake type.

For the "Owner Relinquished" intake type, the intake subtype offers a secondary, more specific explanation of why the animal is in the organization's custody. For any relinquished by owner-related analyses Shelter Animals Count will strive to use of the Human Animal Support Services (HASS) standard owner surrender subtypes listed below.

HASS Standard Values for Owner Relinquished Subtypes

- Permanent life change
- Short-term life change
- Owner death
- Can't afford
- Owner/household factors
- No time/overwhelmed
- Housing
- Behavior per owner
- Owner intended euthanasia*

Owner intended euthanasia may be captured as its own intake type in shelter management software. SAC encourages organizations to continue to capture this information in the stand-alone intake type when possible. Please note that owner intended euthanasia counts submitted to SAC as an intake/outcome is reported as a community service on public reports and dashboards.

Objective

The objective of establishing a data entry best practice for the "Owner Relinquished" intake subtype is to enhance the collection of accurate and specific data regarding the reasons for owner relinquishment. "We recognize that identifying a single reason for owner surrender can be challenging, but having a primary reason selected is most useful for program planning and national aggregation." This improved data collection will not only allow for a more detailed analysis of national trends based on owner relinquishment reasons but also enable a deeper understanding of the factors contributing to owner surrenders. By employing the HASS standard owner surrender subtypes for analysis, SAC aims to provide a clearer picture of the challenges faced by pet owners, thereby aiding in the development of targeted interventions and support programs, as well as informing advocacy efforts and influencing legislation.

Scope

- Applicable to all organization staff responsible for recording intake subtypes for animals relinquished by owner in an SMS or similar data collection system.
- Involves documenting an explanation of why the animal is in the organization's custody.

Best Practices

SAC strongly recommends the use of the HASS standard owner surrender subtypes for data collection. However, we acknowledge that organizations may have their own data collection methods tailored to their unique needs, and transitioning to new subtypes may not be feasible in the short term.

For organizations transitioning to the HASS standard list:

- Provide training for all staff members involved in the intake process on the proper utilization of the HASS standard owner surrender subtypes for accurate identification and categorization of reasons for owner relinquishment.
- Record at the primary reason for surrender from the HASS standard owner surrender subtypes in the data management system upon intake.
- Ensure that the intake subtype for animals relinquished by owner remains consistent unless there are significant changes in their circumstances.
- Maintain uniformity in recording intake subtypes for animals relinquished by owner across all shelter records.

For organizations utilizing their own subtype list:

- Organizations should conduct an audit of their subtypes and ensure they can be aligned to a HASS category.
- Develop a thorough list, including definitions and relevant scenarios, for intake subtypes concerning animals relinquished by owner.
- Provide training for all staff members involved in the intake process, providing detailed guidance on identifying and categorizing the reasons for owner relinquishment accurately based on the developed list of intake subtypes for animals relinquished by owner.
- Record the primary reason for surrender from the organization's subtypes list the data management system upon intake.

- Ensure that the intake subtype for animals relinquished by owner remains consistent unless there are significant changes in their circumstances.
- Maintain uniformity in recording intake subtypes for animals relinquished by owner across all shelter records.

Responsibilities

Data Entry Team: Any staff that records data at the time of intake or during an animal's time in the organization's custody.

- **Intake Staff**
  - Record an intake subtype at the time of intake.
- **Data Entry Supervisor**
  - Implement all possible measures to make intake subtype data entry mandatory and restrict the user's choices to a standard format.
  - Perform audits of data to ensure compliance with best practices and standard values.

Implementation Guidelines

Software Preparation (Data Entry Supervisor)

- Specific steps will be entirely dependent on your chosen data management system.
- Intake subtype must be configured as a required field (if applicable).
- Ensure that users are restricted to entering values that follow the standard values (if applicable).
  - For more guidance on the programming HASS standard categories into your software see the **Programming Standard Intake Subtype and Owner Surrender Reason Values Based on Software Field Availability SOP.**

Recording Intake Subtype at Intake (Intake Staff)
(Data Entry Team – Intake Staff)

- When processing an intake, choose the subtype and reason that best represent the primary cause for surrender from the HASS standard list of owner surrender subtypes and reasons.
- For further details on specific intake procedures, please refer to the references section.

Monitoring and Evaluation

- Establish a baseline measurement of intake subtypes data that is outside of the SOP guidelines.
- Regularly audit data entry practices to ensure alignment with SOP guidelines.
- Employ data quality checks within the system to identify and address inconsistencies.
- Assess the effectiveness of staff training programs regarding intake subtypes recording accuracy.

References

- HASS Playbook: Conversational Interviewing
- HASS Intake Triage: Getting Started
- Intake Triage: At-Intake Form Outline SAMPLE
- HASS Resource: Owner Surrender Intake Reasons
- Intake Reasons Quick-Sheet

Data Entry for Stray at Large Intake Subtype

Publication Date: March 1, 2025

Purpose

Shelter Animals Count is the trusted source for collecting and sharing credible and accessible data to positively impact animals and communities. Standardized data and data collection processes ensure consistency and reliability in the information gathered, enabling SAC to provide national insights. This document outlines data entry best practices for shelter staff to record subtype data on Stray at large intake type in an SMS or other animal data collection method.

The intake type (e.g. Stray at large) provides the primary and most general description of how the animal came into the organization's custody. This intake type also indicates what process the organization may follow during the intake period. For example, does the animal require a holding period, etc. The intake subtype offers additional information for that specific animal and intake type.

For the "Stray at large" intake type, the intake subtype offers a secondary, more specific explanation of how the animal came to be in the organization's custody. For any stray at large-related analyses SAC will use standard stray at large subtypes listed below.

Standard Values for Stray Subtypes

Community-Assisted Admission: Animals brought into the organization for admission by a finder, which could include a member of the public, a volunteer, or non-field services staff. These animals have no identified owner. The individual bringing the animal to the organization may have been advised by field services staff or law enforcement to do so or they may do so without guidance.

Organization-Assisted Admission: Animals are brought to a shelter by field services staff, law enforcement or other government agencies in compliance with local ordinances that mandate the pickup of animals for specific reasons, including being at large, sick, injured, or posing a public safety risk. These animals have no identified owner. Organizations that do not have an animal control department or a contract with one should refrain from using this category.

Objective

The objective of establishing a data entry best practice for the "Stray at large" intake subtype is to improve the accuracy and specificity of data regarding the origins of stray animals. This enhanced data collection will provide a clearer picture of national trends in stray animal intake and allow for a deeper understanding of the factors contributing to the stray population.

By employing standard stray at large subtypes for analysis, SAC aims to provide a clearer picture of the challenges faced by communities and organizations, thereby aiding in the development of targeted interventions and support programs, as well as informing advocacy efforts and influencing legislation.

Scope

- Applicable to all organization staff responsible for recording intake subtypes for stray animals in an SMS or similar data collection system.

- Involves documenting an explanation of how the animal came to be in the organization's custody.

Best Practices

SAC strongly recommends the use of the standard stray at large subtypes for data collection. However, we acknowledge that organizations may have their own data collection methods tailored to their unique needs, and transitioning to new subtypes may not be feasible in the short term.

- Use the stray at large intake type to record instances where an animal was accepted into custody of the organization with no known owner at the time of intake.

- Provide training for all staff members involved in the intake process on the proper utilization of the standard subtypes for accurate identification and categorization of sources of stray animals.

- Record the source of the stray animal from the standard stray at large subtypes in the data management system upon intake.

- Maintain uniformity in recording intake subtypes for stray at large animals across all shelter records.

Responsibilities

Data Entry Team: Any staff that records data at the time of intake or during an animal's time in the organization's custody.

- **Intake Staff**

  - Record an intake subtype at the time of intake.

- **Data Entry Supervisor**

  - Implement all possible measures to make intake subtype data entry mandatory and restrict the user's choices to a standard format.

  - Perform audits of data to ensure compliance with best practices and standard values.

Implementation Guidelines

Software Preparation (Data Entry Supervisor)

- Specific steps will be entirely dependent on your chosen data management system.

- Intake subtype must be configured as a required field (if applicable).

- Ensure that users are restricted to entering values that follow the standard values (if applicable).

  - For more guidance on the programming SAC standard categories into your software see the Programming Standard Intake Subtype and Reason Values SOP.

Resources for Recording Intake Subtype at Intake (Intake Staff)
(Data Entry Team – Intake Staff)

- Your organization's intake procedures SOP.

Monitoring and Evaluation

- Establish a baseline measurement of intake subtypes data that is outside of the SOP guidelines.

- Regularly audit data entry practices to ensure alignment with SOP guidelines.

- Employ data quality checks within the system to identify and address inconsistencies

- Assess the effectiveness of staff training programs regarding intake subtypes recording accuracy.

Data Entry for Transfer Intake Subtype
Publication Date: March 1, 2025

Purpose

Shelter Animals Count is the trusted source for collecting and sharing credible and accessible data to positively impact animals and communities. Standardized data and data collection processes ensure consistency and reliability in the information gathered, enabling SAC to provide national insights. This document outlines data entry best practices for shelter staff to record subtype data on the Transfer in intake type in an SMS or other animal data collection method. It is important to note that transfers are defined as the intake or outcome of an animal to or from another organization or non-animal welfare entity and do not involve interactions between organizations and individual people. This means that animals are relinquished by owner and adopted by individual people, while transfers involve animals being moved between organizations.

The intake type (e.g. Transfer) provides the primary and most general description of how the animal came into the organization's custody. This intake type also indicates what process the organization may follow during the intake period. For example, if an animal is transferred from out of state, is a quarantine period required? The intake subtype offers additional information for that specific animal and intake type.

The Transfer subtype offers a secondary, more specific explanation of why the animal is in the organization's custody. SAC recognizes that organizations commonly collect data on the specifics of transfers (e.g., within coalition, outside of coalition, in-state, out-of-state) in their transfer subtypes for reporting purposes to their communities and other important stakeholders. While tracking transfer logistics is important, this data is better captured elsewhere in various software systems, and therefore, collecting this data in the intake subtype section is redundant and does not provide additional insights. Shelter Animals Count aims to focus on the reasons behind transfers to gain deeper insights into the challenges faced by organizations and the animals in their care. By understanding the underlying causes, we can develop more effective strategies and interventions.

Therefore, SAC recommends organizations shift their focus to collecting data on transfer reasons. Prioritizing the reasons for transfers will provide more meaningful data and better support the needs of shelters and the animals they serve. For any transfer-related analyses SAC will use standard transfer subtypes listed below.

Standard Values for Transfer Subtypes

Resource Availability

Resource Availability - Transfer In Transfer Out
The animal is transferred based on the availability of resources like space, staff, medical care, or adoption opportunities. This includes moving animals at risk of euthanasia or transferring them to areas with lower populations or higher adoption rates to increase their chances of being adopted. Animals at general risk for euthanasia at an organization should be counted here.

Resource Availability - Space - Transfer In Transfer Out
The animal is transferred because the originating organization is at maximum capacity and cannot accommodate additional animals.

Resource Availability - Organizational Capacity (outside of space alone) - Transfer In Transfer Out
The animal is transferred based on the availability of resources like space, staff, medical care, or adoption opportunities. This includes moving animals at risk of euthanasia or transferring them to areas with lower populations or higher adoption rates to increase their chances of being adopted. Animals at general risk for euthanasia at an organization should be counted here.

Resource Availability - Transfer In Transfer Out
The animal is transferred due to the originating organization's lack of capacity, including limitations in staff, finances, or other organizational resources not related to space alone, making it difficult to provide the necessary care.

Resource Availability - Medical Needs - Transfer In Transfer Out
The animal requires medical treatment that the current organization cannot provide. The transfer is made to a facility with the necessary medical resources and/or expertise.

Resource Availability - Behavioral Needs - Transfer In Transfer Out
The animal has behavioral issues that the current organization is not equipped to manage. The transfer is made to an organization with behavior specialists or specific programs to address these issues.

Resource Availability - Species/Breed Specificity - Transfer In Transfer Out
The animal is transferred to an organization that specializes in certain species or breeds, providing specialized care and adoption opportunities for those animals.

Emergency Response

Emergency Response   - Transfer In Transfer Out
Transfers made in response to emergency situations, including natural disasters, catastrophic events, and seizure support. Emergency situations do not include animals that are at general risk for euthanasia at an animal welfare organization and should not be counted here.

Emergency Response - Disaster - Transfer In Transfer Out
The animal is transferred due to an impending or recent disaster such as hurricanes, floods, or wildfires that compromise the originating organization's ability to care for the animal or leads to a surge in shelter population.

Emergency Response - Catastrophic Event   - Transfer In Transfer Out
The animal is transferred due to a catastrophic event such as fire, building collapse, or other emergency that compromises the originating organization's ability to care for the animal or leads to a surge in shelter population.

Emergency Response - Seizure Support   - Transfer In Transfer Out
The animal is transferred to the receiving organization as a result of a seizure conducted by or supported by the originating organization, which has led to a surge in shelter population beyond normal capacity. Animal control personnel may seize or receive animals due to cases of cruelty or neglect. During these investigations, animals can be surrendered before or at the conclusion of the court case rather than being returned to their original owner. If a large number of animals are surrendered, or if the animals have significant medical or behavioral challenges, the originating organization may reach out to their shelter and rescue partners for support. Organizations offering this support are not legally mandated to do so.

Legal Obligation

Legal Obligation **- Transfer In** **Transfer Out**
Transfers mandated by legal requirements, including municipal contracts, local ordinances and adoption contracts, to comply with laws and regulations.

Legal Obligation - Government Contract **- Transfer In** **Transfer Out**
The animal is transferred as part of a municipal contract requiring the originating organization to transfer the animal to the receiving organization that is required to house animals from specific areas or jurisdictions.

Legal Obligation - Originating Organization **- Transfer In** **Transfer Out**
The animal is transferred due to obligations related to adoption contracts or microchip registration.

Legal Obligation - Ordinance **- Transfer In** **Transfer Out**
The animal is transferred to comply with local ordinances or breed restrictions that prevent the current organization from housing certain breeds or types of animals.

Non-Animal Welfare Entity **- Transfer In** **Transfer Out**
The animal is transferred from a non-animal welfare organization (NAWO), such as a government agency, laboratory, breeding facility, or other entity that requires placement with an animal welfare organization or they may be at risk for euthanasia. The animal was not seized; rather, it was surrendered voluntarily by the NAWO. However, since these organizations are not considered individuals, the process is classified as a transfer. Additionally, animals abandoned on private property, such as at veterinary offices or police stations, should not be counted here, as those entities never took ownership of the animals. Such scenarios should be categorized as stray intakes.

Non-Animal Welfare Entity - Working Animal **- Transfer In**
The animal is transferred to the receiving shelter because it is a retired working animal from a government agency or other private entity that requires placement with an animal welfare organization upon retirement, or they may be at risk for euthanasia.

Non-Animal Welfare Entity - Laboratory Animal **- Transfer In**
The animal is transferred to the receiving shelter because it is a retired laboratory animal, including breeding animals, that requires placement with an animal welfare organization upon retirement, or they may be at risk for euthanasia.

Non-Animal Welfare Entity - Breeding Facility Animal **- Transfer In**
The animal is transferred to the receiving shelter because it is a retired breeding facility animal that requires placement with an animal welfare organization upon retirement, or they may be at risk for euthanasia.

Transfer Return

Transfer Return **- Transfer In** **Transfer Out**
The animal is transferred back to the original organization or another facility after being previously transferred, typically due to adoption returns or inability to place the animal.

Objective

The objective of establishing a data entry best practice for the "Transfer" intake subtype is to enhance the collection of accurate and specific data regarding the reasons for transfers. This improved data collection will not only allow for a more detailed analysis of national trends based on transfer reasons but also enable a deeper understanding of the factors contributing to the movement of animals between organizations.

By employing standard transfer subtypes for analysis, SAC aims to provide a clearer picture of the challenges faced by communities and organizations, thereby aiding in the development of targeted interventions and support programs, as well as informing advocacy efforts and influencing legislation.

Scope

- Applicable to all organization staff responsible for recording intake subtypes for transferred animals in an SMS or similar data collection system.
- Involves documenting an explanation of why the animal is in the organization's custody.

Best Practices

SAC strongly recommends the use of the standard transfer subtypes for data collection.

- Use the transfer intake or outcome type to record instances where an animal is transferred to or from another organization or non-animal welfare entity. Transfer intake and outcome types should not be used for interactions between an organization and an individual person.
- Provide training for all staff members involved in the intake process on the proper utilization of the SAC standard subtypes for accurate identification and categorization of reasons for transfer.
- Record the primary reason for transfer from the standard transfer subtypes in the data management system upon intake.
- Ensure that the intake subtype for transferred animals remains consistent unless there are significant changes in their circumstances.
- Maintain uniformity in recording intake subtypes for transferred animals across all shelter records.
- Ensure that both the originating shelter and the receiving shelter have corresponding transfer in and out subtypes. For example, if the originating shelter transfers out an injured animal due to resource availability, the receiving shelter should also use the resource availability subtype.
- Organizations often record the original intake type (e.g. stray, owner surrender, etc.) of transferred animals as it was documented by the originating shelter to easily reference the animal's history. However, this practice is not recommended. The receiving organization should document Transfer In as the intake type for any animals moved from another organization or non-animal welfare entity. For organizations that wish to capture the original intake type of an animal, many software platforms offer a designated area for this information. Refer to the guide on For guidance on how to accurately record a community intake for an animal, please reach out to your shelter software provider.

Responsibilities

Data Entry Team: Any staff that records data at the time of intake or during an animal's time in the organization's custody.

- **Intake Staff**

  - Record an intake subtype at the time of intake.

- **Data Entry Supervisor**

  - Implement all possible measures to make intake subtype data entry mandatory and restrict the user's choices to a standard format.

  - Perform audits of data to ensure compliance with best practices and standard values.

Implementation Guidelines

Software Preparation (Data Entry Supervisor)

- Specific steps will be entirely dependent on your chosen data management system.
- Intake subtype must be configured as a required field (if applicable).
- Ensure that users are restricted to entering values that follow the standard values (if applicable).
  - For more guidance on the programming SAC standard categories into your software see the **Programming Standard Intake Subtype and Reason Values SOP.**

Recording Intake Subtype at Intake (Intake Staff)
(Data Entry Team – Intake Staff)

- When processing an intake, choose the subtype and reason that best represent the primary cause for surrender from the SAC standard list of owner surrender subtypes and reasons. Intake subtype must be configured as a required field (if applicable).

Monitoring and Evaluation

- Establish a baseline measurement of intake subtypes data that is outside of the SOP guidelines.
- Regularly audit data entry practices to ensure alignment with SOP guidelines.
- Employ data quality checks within the system to identify and address inconsistencies.
- Assess the effectiveness of staff training programs regarding intake subtypes recording accuracy.

Monitoring and Evaluation

- SAC Standard Transfer Subtypes

Glossary

Non-Animal Welfare Entity: Any entity involved in the handling or care of animals that is not an animal welfare organization. This includes non-sheltering service providers, animal testing laboratories, commercial breeders, government agencies, etc.

Community Intake: Refers to animals that enter an organization directly from a community source. Community intake types include stray/at-large, relinquished by owner, seizure, and animals born in care. Stray at large does not fall under community intake.

Data Management System: A mechanism for collecting, organizing, and storing data, whether in digital or physical formats. Examples include shelter management software, spreadsheets, CRM systems, other software platforms, or filing systems designed for paper records.

Data Field: A specific location or space within a database or dataset where a single piece of information can be stored, such as a name, date, number, or description. It serves as a container for organizing and categorizing data in a structured manner.

Field: A specific location or space within a database or dataset where a single piece of information can be stored, such as a name, date, number, or description. It serves as a container for organizing and categorizing data in a structured manner.

Internal Medical Support: Having veterinarians as part of an organization's staff to provide medical care and supervision for the animals under the organization's care and to provide medical training to other support staff members.

Organization: Entity of any type or size that provides temporary housing for companion animals; includes government animal services, brick and mortar shelters, or foster-based rescues.

Relinquished By Owner: Admitted by owner, including adoption returns. This term is used synonymously with "owner surrender."

Shelter Management Software (SMS): An application designed to assist animal shelters and rescue organizations in efficiently managing and maintaining comprehensive records and operations related to the care, treatment, and placement of animals. This software typically includes features for animal intake, medical records management, outcome tracking, reporting and may also include donor management, volunteer coordination with the overarching goal of improving the welfare of animals and streamlining administrative processes within the organization.

Size: The animal's approximate size classification if they have reached adulthood or the estimate of their size once they reach adulthood.