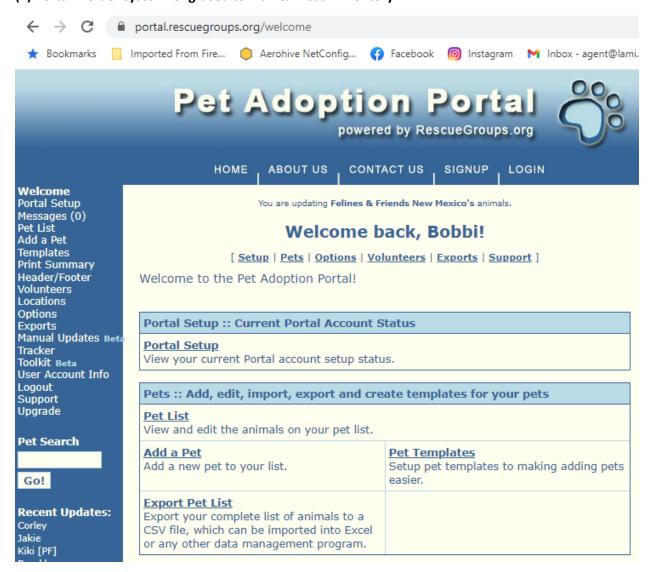
The following systems are used to meet common small business needs, plus shelter activities such as:

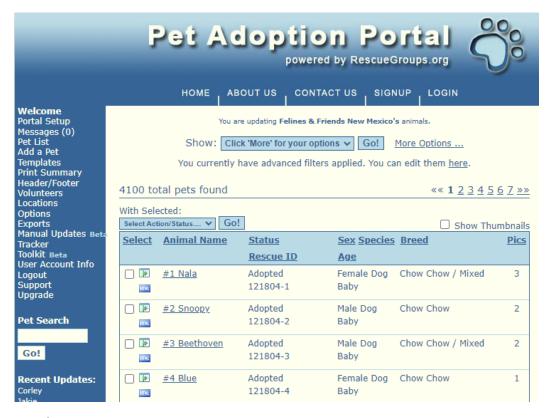
- Cat surrender/intake records
- Veterinary visit records
- Rabies and Spay/Neuter certificates
- Cat "inventory" data and photos
- Data/photos exported to adoptable pet websites
- Adoption Applications and Contracts
- Volunteer and Foster Applications

Here are some of the main systems used by Felines & Friends:

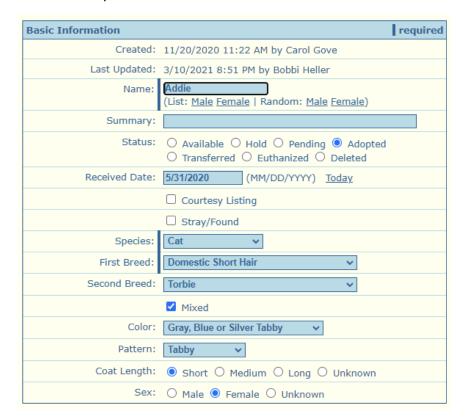
(1) Portal – Older system long-used to maintain cat "inventory"



Portal Pet List...



Portal Pet Entry...



Additional Information			
General Age:	Baby O Young O Adult Senior O Unknown		
General Adult Size:	○ Small ● Medium ○ Large ○ X-Large ○ Unknown		
Spay/Neutered:	● Yes ○ No ○ Unknown		
Up-to-date:	Yes O No O Unknown		
Housetrained:	Yes O No O Unknown		
Declawed:	○ Yes No ○ Unknown		
Special Needs:	○ Yes No ○ Unknown		
Home with Kids:	Yes O No O Unknown		
Home with Dogs:	○ Yes ○ No ● Unknown		
Home with Cats:	Yes O No O Unknown		
Rescue ID:	H-053120-P6 (public)		
Internal ID:	Artesia 5/31/20 (private)		
Foster/Caretaker Contact:	ker Contact: Select a Contact V		
Location:	on: Select a Location Allow public to see location Postal Code		
Microchip:	Found Animals > # 981020035907488		

Example Description Text:

HISTORY: ARFIE, ADDIE, and AUBREY were brought to us from Artesia, NM by a rescue partner there. These kittens are very active, and love to run, jump, chase and skid around corners. They all love sitting on a tall cat condo and watching birds outside the window, and sleeping in the sun. They are used to wrestling with the three older male cats in their foster home. They all know their names and come when they are called. They hope that their forever home has a lot of empty Amazon boxes, because they are their favorite toys. AUBREY and ADDIE are bonded and should be placed together if possible. ARFIE is more independent.

TEMPERAMENT: ADDIE is a grey torbie with white stripes and peach markings, long, thin body type. She may have the longest tail in Santa Fe. She loves playing in paper bags, and adeptly catches moths if they are within reach. She is an explorer and often gets closed up in a closet or cabinet. She may have the longest tail of any kitten in Santa Fe.

AGE: born approx. 5/10/20

MICROCHIP #: 981020035907488 **DATE OF STERILIZATION:** 9/24/20

VAX RECORD: FVRCP #1: 10/13/20, FVRCP expires: 10/13/21; Rabies expires: 9/24/21

FELV/FIV test: negative 9/24/20

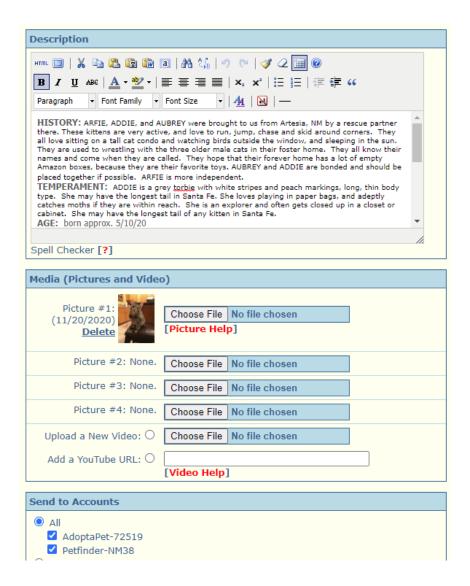
ADDITIONAL INFORMATION:

ADOPTION FEE: \$100

If you are interested in adopting this cat, please fill out our <u>Adoption Application</u> completely. In the space provided on the form, please include contact information for three (3) personal references to whom you are **NOT** related or shares your home. For more information, please visit our website at www.fandfnm.org

[Santa Fe Animal Svcs. Permit #20-04]

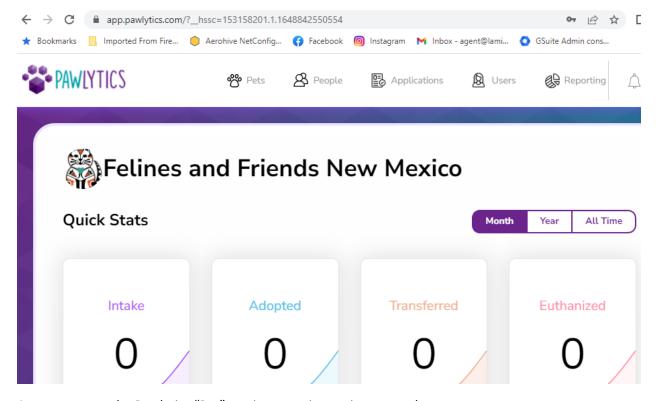
Addie and Aubrey were adopted together on 1/2/21



When a cat is surrendered to Felines & Friends or comes in another way (e.g., Intake of cats transferred from other shelters, strays, babies born to pregnant moms), data needs to be copied from any available Intake/Surrender paperwork into a new Portal entry. But first we check Portal to see if a previously-adopted cat may already be in our system, in which case the existing Portal entry gets updated.

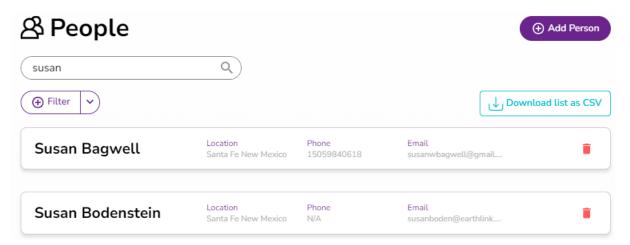
(2) Pawlytics – Newer system used to maintain cat "inventory" since early 2021

F&F has been attempting to transition from Portal to Pawlytics but is currently maintaining inventory data in both systems. Unfortunately, sometimes entries are added only to Portal; other times entries are added only to Pawlytics. We recently assigned a new volunteer to cross-check currently-adoptable cats in both systems to make sure they're aligned.

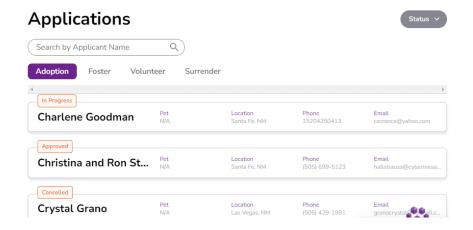


As you can see, the Pawlytics "Pet" section contains cat inventory data.

The People section contains contact data for Volunteers and Fosters, for example:

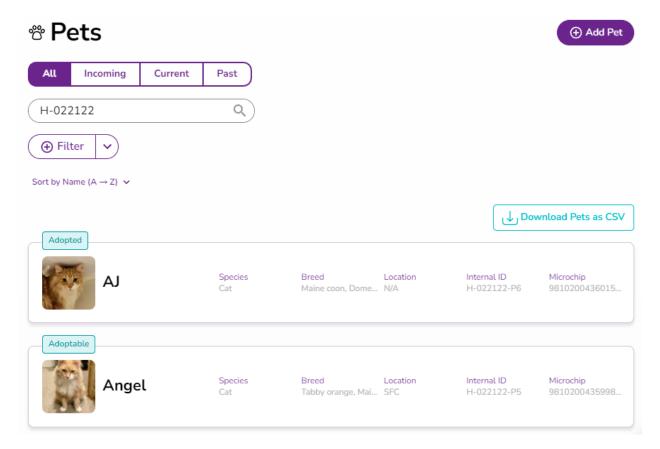


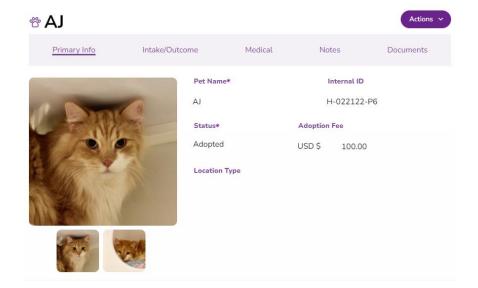
The Applications section contains Application/Status information, for example:



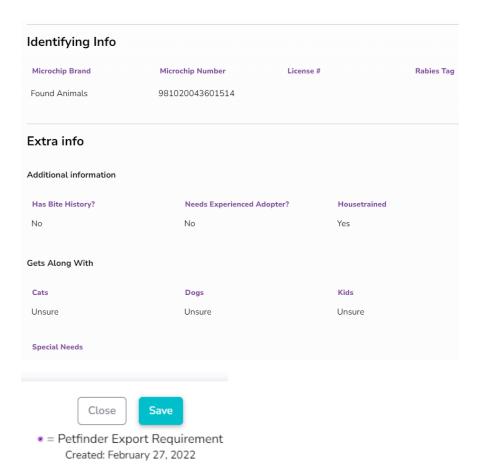
The Adoptions and Foster teams (volunteers) are largely responsible for maintaining these sections.

In addition, when a cat is surrendered to Felines & Friends or comes in another way (e.g., Intake of cats transferred from other shelters, strays, babies born to pregnant moms), data needs to be copied from the new/updated Portal entry into a new/updated Pawlytics Pets entry. Unfortunately, the structure and contents of Portal and Pawlytics entries differ, so this means a manual copy/paste and re-entry of some data as follows...





Descriptive Info Species* Breed Mixed? Cat Yes Domestic Long Hair (Oran... Maine Coon DOB* Age **Adult** 07/25/2015 6 Years 8 Months Weight* Colors **Medium** 8 lb orange white Sex* Altered Declawed (cats only)* Male Yes No Description **Distinguishing Marks** Youtube URL HISTORY: AJ came to F&F when his owner moved and could not take all her pets with her. TEMPERAMENT: AJ is a soft softy who loves attention, being petted and brushed. He is a sweet, outgoing cat. AGE: born 07/25/2015 MICROCHIP #: 981020043601514

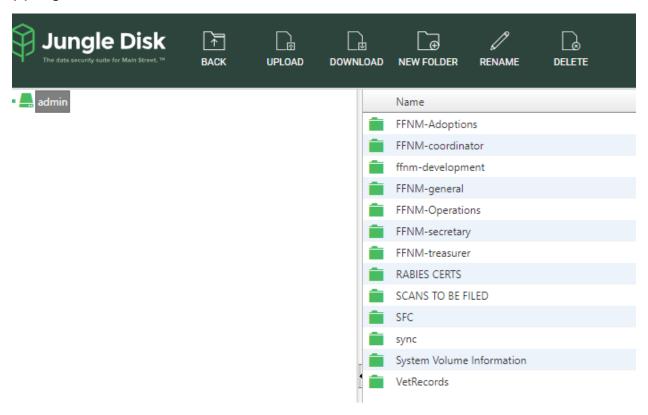


It's important to keep the status, microchip, and description text aligned between Portal and Pawlytics, and for the description text to follow the template generated by Portal (including the Permit Number at the end of the text, required by law when taking payment for animals).

It's also important to meet Petfinder Export Requirements. These are marked with an asterisk, and also affect the size and quality of all photos used. When a requirement is not met (for example, missing a weight, adding a photo that's > 5MB) the entry will not be exported to Petfinder and that poor cat will simply be invisible to potential adopters! So we recently assigned a volunteer to regularly check Pawlytics entries to make sure that all Adoptable cats are meeting Export Requirements.

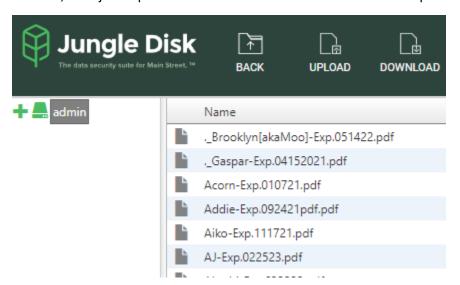
Currently, the Adoptions team, Foster coordinators, staff, and some other volunteers (e.g., Lisa Phifer) are responsible for adding and maintaining Portal and Pawlytics entries. For example, staff may move a cat from Pending status to Adoptable status after they've seen a vet. A Foster coordinator may add a new photo taken by a foster parent. The Adoptions team may move a cat from Adoptable to Adopted status. When a cat is spayed/neutered/chipped/vaccinated, someone needs to copy those dates and numbers from vet records/rabies certificates into the descriptive text.

(3) JungleDisk – A shared file server used to house all F&F business data and shelter forms

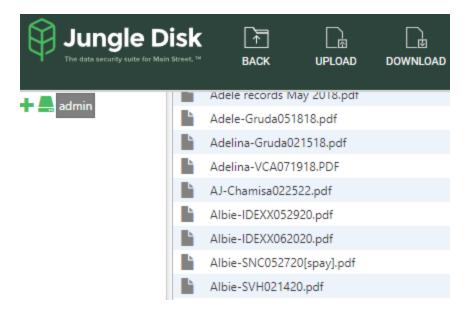


Access to this system is restricted due to sensitive content.

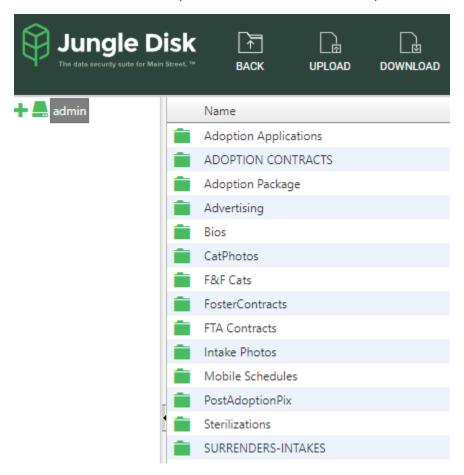
For now, I will just explain some of the forms that are scanned and uploaded into JungleDisk...



When rabies certificates are scanned and uploaded into the RABIES CERTS/Current, the originals are returned to Santa Fe Cats and added to the cat's physical "Folder" created by Susan. Their "Folder" stays with the cat and gets updated until Adoption, at which time it goes home with the adopter. However, the data on the rabies certificate also needs to get entered into Portal and Pawlytics – this can be done from the scanned file.



When vet visit records are scanned and uploaded into the VetRecords folder, the originals are returned to Santa Fe Cats and added to the cat's physical "Folder." This includes vet records received with a surrendered/transferred cat as well as vet records for visits during the cat's time in F&F's care. Some of this information must be copied from scans into Portal/Pawlytics – for example, vaccination dates.



When Applications are scanned and uploaded into one of these folders (Foster, FTA, Surrenders, Adoption Contracts), the originals are returned to Santa Fe Cats and kept on file. But like other forms, these scanned forms contain some data which needs to be entered into Portal/Pawlytics.

For example, Adoption Contract information needs to be copied into Pawlytics People and Pets sections. Foster Contract information needs to be copied into the Pawlytics People section. We are currently having a hard time keeping up with these data entry tasks.

Foster information also needs to be linked to the cat's Pet entry so that the location of the cat can be tracked (that is, the name of the foster and the fact that they're in foster care). The Foster Coordinator(s) usually do this. Cats also get moved from Santa Fe Cats (SFC, our boarding facility) to PETCO and TecaTu (our offsite/retail adoption facilities). This information sometimes lags behind actual cat movement and would benefit from being checked regularly.

Below are some examples of forms that get scanned and provide this data...





Chamisa Mobile Veterinary Services, LLC 1541 South Saint Francis Drive Santa Fe, NM 87505 United States (505) 795-2300

GENERATED: 3/23/2022 4:15 PM

Client Information

Bobbi Heller - Felines and Friends New Mexico 154 Tano Rd Santa Fe, NM 87506 (505) 670-8823

Patient Information

Name	A.I.	Cassias	Feline	<u>Weight</u>	0
Name	AJ	<u>Species</u>	Feline	Microchip	NONE
Sex	Male Neutered	Breed	Maine Coon		
Status	Active	DOB	2/25/2012		
ld	6012	Age	10 years		
Color	NONE	<u>Tag</u>	NONE		

Medical Chart from 1/1/2000 - 3/22/2022

,	
Service on 2/25/2022	
	ı
L	

2/25/2022 1:57 PM Procedure Venopuncture Jennifer Garcia, D.V.M. 2/25/2022 1:57 PM Procedure Ear Cleaning Jennifer Garcia, D.V.M.

2/25/2022 2:12 PM Exam Wellness Exam Jennifer Garcia, D.V.M.

Weight:

Wellness exam, feline combo test and Rabies vaccines. No health concerns reported by owner. No vomiting, diarrhea, coughing, or sneezing. Eating and drinking well. Normal activity level.

Diet:

Preventatives:

Example Adoption Application (page 1 of 3)

Name:

AJ Buchanan, AJ Buchanan

Date

08/22/2019

Address

1193 Camino Montoya

Zip Code

87582

Email:

firstresponderinfonm@gmail.com

Home Phone

5054849424

Work Phone

5054849424

Drivers Lic. #:

What is your primary reason for wanting to foster a cat?

I have a sweet cat who needs a companion.

Who shares your household?

Nobody

If there are children in your household, please list their ages:

Are all members of the household aware, and in agreement fostering a cat?

Yes

Type of dwelling:

House

If you live in an apartment/condo, what floor?

Do your doors/windows have screens?

Yes

If yes, How old are the screens?

3 years

Do you have a "dog door"?

No

If renting, are you legally permitted to have cats?

Yes



369 Montezuma Ave. #320 Santa Fe NM 87501 (505) 316-2281 www.fandfnm.org

ADOPTION CONTRACT In consideration of receiving the feline described herein from FELINES & FRIENDS, hereinafter referred to as F&F, the undersigned Adopter agrees to be bound by the following terms and conditions: 1. Adopter will provide proper and sufficient food, water, shelter and kind and careful treatment for the feline at all times. Under no circumstances shall this feline will be permitted to roam free outdoors. Adopter agrees to provide feline with proper indoor sanitary facilities and keep felines INDOORS at all times, unless supervised or in a secure cat enclosure. This feline must wear a collar and ID tag at all time in order to facilitate its return in the event of accidental release. Upon delivery of the feline an F&F representative shall verify that Adopter has in his/her possession a plastic or canvas pet carrier (no cardboard) of appropriate size for an adult cat, which shall be kept accessible at all times for use in the event of an emergency. Adopter shall have a pet carrier per cat. At no time shall the feline be transported other than in said pet carrier. Adopter agrees to take this feline to a veterinarian for examinations and immunizations at least annually and will provide immediate veterinary care should the feline become ill or injured. Said care shall be at Adopter's expense. If this feline is found to be in ill health due to neglect for any length of time, F&F shall have the right to reclaim the feline Under no circumstances shall this feline be declawed. Initials In the event that Adopter is no longer able to provide this feline with a proper home, the feline must be returned to F&F with reasonable notice to facilitate the return of such feline. If the feline is returned for any reason, Adopter will at no time assert any claim or demand against F&F for any charges which may have been incurred in connection with the feline. Under no circumstances shall this feline be sold, leased, loaned, given, gifted, or willed to any third party, pet shop, pound, research laboratory, or similar facility. Initials pound, research laboratory, or similar facility. Initials PAS

10. All felines have been examined by a vet prior to adoption and the feline is assumed to be in good health at the time of adoption (unless otherwise noted on this Adoption Contract. Adopter is fully aware that F&F makes no guarantees whatsoever as to the future health of the feline. Adopter hereby fully and completely releases F&F, its agents and volunteers from any defects or illnesses the feline may have or develop, and from any claim, cause of action or liability for any injury of or damage to persons or property which may be caused by the feline, and to indemnify and hold F&F harmless against all claims, including, but not limited to, those asserted by third persons, for any injury or damage to persons or property caused by the feline. I acknowledge receiving information regarding follow up vet care. Initials acknowledge receiving information regarding follow up vet care. Initials PRC 11. Adopter shall pay F&F \$500 as liquidated damages in the event Adopter breaches any of the provisions of this Adoption Contract. Adopter further agrees that F&F shall, in addition to the collection of such liquidated damages, retain all of the other remedies, including, but not limited to, the inspection and reclaiming of the feline provided for in this Adoption Contract and allowed at law or in equity. 12. Adopter agrees to pay and reimburse F&F for any and all legal fees and court costs it incurs in enforcing the terms and conditions of this Adoption Contract. 13. This Adoption Contract shall be governed by the laws of the State of New Mexico 14. In the event that any term, provision or paragraph of this Adoption Contract is, or is declared illegal, void or unenforceable, this shall not affect or impair the other terms, provisions, or paragraphs of this Adoption Contract and the doctrine of severability

Agreed and accepted this the Name of Feline: Date of Sterilization: FELV/FIV tested: 8-13-21 NES Special Needs: NONE It is the policy of Felines & Friends that all animals are sterilized prior to adoption. However, if the animal is deemed by to be too young or requires additional time to mature, the Adopter agrees to bring the feline back to the Spay Neuter Clinic at 2570 Camino Entrada [off Cerrillos Rd] for sterilization not later than . Failure to do so shall be considered a material breach of this Adoption Contract. MICROCHIP #:

FELINES & FRIENDS INTAKE FORM
V Name: Shalloy appa walton
Your Name: Shelley anne walton Address: 715 Walker st
Phone number: 505-363-1442
Priorie number. 300 000 1442
Reason for Surrender: I am moving to Oklahoma and my girlfriend that i was taking care of passed away today i cannot take all of my fur
Babies .
Name of Cat: Angel
Date of Birth: 06/2014
Gender: Male
Breed: Domestic short hair
Hair Length: Short-hair Johns.
Color: Orange tabby Mi Hed
Estimated size at maturity: 8 tos 9 lbs 7 03
Distinctive Features: White chest
O (N 1 D-1 10/20/2014
Spay/Neuter Date: 10/29/2014 Where done: All Creatures Veterinary clinic Moriarity, NM
vvnere done: All Creatures veterinary clinic Monanty, NW
FVRCP Expires: 3 (15/23
Rabies Expires: 10/29/2015 3/7/23
FELV/FIV Test Date: 3/7/22
Pos/Neg? new
Microchip #: N/a
Likes Dogs? Yes small ones
Likes Cats? Yes
Likes Kids? Don't know
Declawed? No
Personality: Loves to cuddle at night and loves to knead
·
Name of Current Vet: Staci Thornton
Last Vet Exam: 2014
Known Health History: Healthy
100.000000

Notice that some surrender data gets updated after the cat is added, as forms are often incomplete. This is an example of why data gets out of sync between Portal and Pawlytics.

Often someone adds/updates data in one system but not the other.