What’s New Webinar

September & October 2011
Today’s Topics

• Ownership/Guardianship Redesign
• Advanced Animal Search
• Prescription Form
• Adopters Checklist
• Staples Program Update
• Cash Drawer Closing Report
Changes to the PetPoint Application
• Changes we will be covering:
  – Edit Ownership/Guardianship
    • An updated “tabbed-style” workflow has been added to the function of Edit Ownership/Guardianship, as well as new searching abilities.
  – Advanced Animal Search
    • Access to the standard animal search options within the new search tabs.
    • This option is available on Edit Ownership/Guardianship and Search/Edit Medical and is in response to the highly requested need to search for all medical or ownership records by Animal Name (or other animal details)
• Edit Ownership/Guardianship is used to:
  – Register microchips with 24PetWatch
  – Link owners/guardians with the animals they have in their care for the purpose of creating a receipt.
  – Create new animal records that are not a part of an intake (Inactive animals with the stage of Ownership)
  – Update the animal’s ownership post outcome
- Tabs for Ownership/Guardianship operations:
  - Search
  - Person
  - Animal
  - Details
  - Summary

Ownership/Guardianship Tabs
Ownership/Guardianship Search

<table>
<thead>
<tr>
<th>Search criteria: Ownership/Guardianship</th>
<th>Ownership #</th>
<th>Ownership / Guardianship #</th>
<th>Find</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search criteria: Ownership/Guardianship</td>
<td>Ownership Date</td>
<td>Completed From</td>
<td>Completed To</td>
</tr>
<tr>
<td>Search criteria: Person</td>
<td>Name</td>
<td>First</td>
<td>Middle</td>
</tr>
<tr>
<td>Clear Search</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create New Ownership/Guardianship</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Search Tab** -
  - Search for previously created ownership records
    - By Ownership # or Ownership Date
    - By Person
    - By Animal
    - By Last 10 Ownerships accessed or created

**Ownership/Guardianship Search**
If you do not have the animal number or reference number, you may utilize the Advanced Animal Search.

Click the Animal Search button to launch a pop up window that contains the standard animal search options.

Search for an animal using your preferred method.
Click the Animal # within the search results to select the animal.

- This will hide the window and add the Animal # to the field on the Ownership Search.

Advanced Animal Search: Results
• Click **Find** to display all ownership records for that animal.
• You can also click the Ownership # to view the details.

Ownership Search: Results
• To create a new record, click the **Create New Ownership/Guardianship** button to move to the next tab.
The first step is to select a person record that already exists in PetPoint, or create a person for the ownership record.

- Search first, then click **Create New Person** if none is found. This will display the Express tab of the Person details.

This tab must be completed to move to the next tab where you select or create an animal.
• When creating a new person, you will find the embedded Person tabs show, giving you access to all aspects of the person’s record.
  – Express tab information must be saved first.
  – Requirements are: First Name, Last Name, Phone Number or select “No Phone Numbers.”
  – Association is highly recommended, and contact information should be included for ownership records in which a microchip is being added.
• Click **Save** to save the record and access the remaining Person tabs.

• Click **Update Ownership Person** to save the record and move to the Animal tab.

**Person Tab**
• On the Animal Tab, you may search for and select an Inactive animal record.
  – Active animals will have their ownership record created during outcome adoption, RTO, clinic or service.
If no record is available, click **Create New Animal** to show the embedded animal tabs and enter all required information on the express tab.

### Animal Tab

<table>
<thead>
<tr>
<th>Animal #</th>
<th>Reference#</th>
<th>Name</th>
<th>Type</th>
<th>Species</th>
<th>Primary Breed</th>
<th>Purebred</th>
<th>Secondary Breed</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;NEW&quot;</td>
<td></td>
<td>Friday</td>
<td>Cat</td>
<td>Cat</td>
<td>Domestic Shorthair</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Age**: [years]  
**Age Group**: Young Adult  
**Gender**: Female  
**Spayed/Neutered**: Yes  
**Size**: Small  
**Weight**: -- Select --  

**Animal Condition**: Appears Normal  
**Asilomar Status**: -- Select --  
**Primary Color**: Black  
**Secondary Color**: -- Select --  
**Color Pattern**: -- Select --  
**Bitten Status**: No Bite History  

[Options for Submit Ownership and Clear]
• Click **Save** to show the remaining animal tabs.
  – At this point you will gain access to the kennel cards, documents and Jump To menu, and also the remaining animal tabs to enter additional details.

• Click **Add Ownership Animal** to save the record and move to the next Ownership tab - *Details*.
When using the Ownership tabs to create a microchip registration with 24PetWatch, don’t forget to add the chip number & issuer on the Edit Animal Express tab. The information will be sent to 24PetWatch when you Submit Ownership at the end of the process.
When using the new ownership screens you have the ability to select multiple animals to add to this ownership record, much like the Add Another Animal feature.

- To begin the process, after selecting or creating the first animal record, click on the Animal Search tab and repeat the steps.

There are 3 options to create a second or multiple animal record.
If the second animal record needs to be created and added to the same person & ownership record, there are several options:

- Search for and select a second inactive animal record.
- **Create New Animal** to begin with a new animal record.
- **Duplicate Selected Animal** to show the same animal details on the express tab, but it also allows you to change what is different about the second animal and save a brand new animal record.
When adding animals that are similar in breed, age or description, the **Duplicate Select Animal** button will save you a great deal of time.

- Make sure the initial animal is selected and click Duplicate Selected Animal, this will show you the Express tab.
- Click on the Express tab to view the same animal details, and change only what you need, finishing this new record by clicking **Add Ownership Animal**.
### Animal Tab: Duplicate Selected Animal

#### Animal Details

- **Animal #:** NEW
- **Name:** Dakota
- **Type:** Dog
- **Species:** Dog
- **Primary Breed:** Beagle
- **Purebred:**
- **Secondary Breed:** Mix

#### Animal Search

- **Age:**
  - Years
  - Est. Birthday
  - Age Group
  - Gender
  - Spayed/Neutered
  - Size
  - Weight

- **Animal Condition:** Appears Normal
- **Asilomar Status:**
- **Primary Color:** Tan
- **Secondary Color:** White
- **Color Pattern:**
- **Bitten Status:** No Bite History

#### Stage & Location Express

- **Stage:**
- **Review Date:**
- **Location:**
- **Sub Location:**

#### User Actions

- **Clear**
- **Save**
- **Update Ownership Animal**
• When duplicate or multiple animals are added to the Ownership record, they will show in the grid at the top of the page.

• Check the “Select” check box for an animal to:
  – **Apply Selected** - to show the Edit Animal tabs so that you can edit & save details for that animal’s record.
  – **Delete Selected** - to remove an animal from the list that you have added to the grid but do not wish to include in this ownership record.

**Animal Tab: Multi Animal Grid**
• The next tab - Details - summarizes the ownership information being created.
  – Make sure the animal list at the top of the page is 100% correct. If changes need to be made, return to the Animal tab.
  – The Completed By drop down list can be altered, but should default to the name of the person who is logged in. This list is generated from those people with the association “Operation By”.
• Click the **Submit Ownership** button when you have completed all tabs to save your work and send the information to 24PetWatch.

**Details Tab**
From the Summary tab you can do any of the following:

- Jump To
- Print Kennel Cards
- Print Documents
- Print Medical Documents
- Create Receipt
- Issue Refund
- View the Animal Info and Summary for each animal attached to this Ownership/Guardianship record.
Ownership / Guardianship

Person: Lissa Cooper

Summary Tab
• With the new Prescription Form, clinic staff can now quickly and easily print customizable prescription forms for animals from within the Medical Module. Form fields include veterinary information such as License # and Signature allowing transferability in a readable print document.

• Administrators can add custom text to the Prescription Form through the Admin Options: Add/Edit Contract Text page. Contracts by Subtype are not an option with this Contract Type.

• NOTE: Shelter Address will populate with Company Info unless shelter is multi-site, in which case the Site Address will appear, based on Site the animal is in at the time of Treatment.
Treatments include Procedures, Medications, Food and Tasks. Select “Script” when adding a Treatment and you will see a new row of fields. All fields are mandatory.

- Substitution: Choices are “Generic Equivalent Permissible” and “Dispense as Written/Brand Medically Necessary”
- # of Refills Authorized: Enter the number of refills.
- Prescription Expiration: Enter the date/time that the prescription expires.
• On the Treatment tab, the new Prescription Form can be accessed when a Treatment that has been marked as “Script” has been added, then selected.

• When Treatments are added as “Treat” or “Fill” the Prescription Form button will not appear.

• The Treatment “Method” radio button can only be set to Script or Fill if the Status of the Treatment is Complete.

Prescription Form
Mrs. Melissa Thompson  
1020 Yorkshire Drive  
SHERMAN, Texas, 75092  
USA  
Tel: 371-547-1985

**Animal Information**

- **Animal ID:** A04022090
- **Name:** Spartacus
- **Types:** Dog
- **DOB:** 12/22/2000
- **Breeds:** Old English Sheepdog, Retriever, Labrador
- **Gender:** Male
- **Altered:** No
- **Pre-Altered:**
- **Chip #:** 10 y 9 m 0 d
- **Colors:** White/Wheaten
- **Pattern:** Solid
- **Age Group:**
- **Size:** Large

**Prescription Information**

- **Exam/Surgery #:** M13899034
- **# of Refills Authorized:** 2
- **Type:** Medication
- **Medication:** Acepromazine Tablets 25 mg (Acevet 25 Tablets)
- **Manufacturer:** Vetoquinol
- **Product:** Acevet 25 Tablets
- **Substitution:** Generic Equivalent Permissible
- **Dose:** 1 tablet
- **Recurrence:** 2 x’s every 1 day(s) for 30 Days (1 of 60)
- **Total:** 60.00
- **Body Part:**
- **Instructions:** give 1 hour to 30 minutes prior to thunderstorms
- **Route:** Orally

**Prescribed By**

- **Name:** Bob Barker
- **DVM License #:** 1342352465
- **Treatment Notes**
• The Adoption Checklist will collect data on free products provided to new cat and dog adopters at point of adoption.

• Information gathered from this new feature will be used to enhance post-adoption revenue stream building for shelters through improved target marketing.

Adoption Checklist
• We have added an additional “Adopter Checklist” section to the Details Tab of Adoption that users must complete for dog and cat adoptions.

• The Adopter Checklist is now mandatory.

• The results of the checklist will be provided to the adopter.

• No administrative setup is required.

Adoption Checklist
In this section you will simply indicate which, if any, free products you already provide in your adoption packet.

Answers for this question are:
- No free products provided
- Hill’s Science Diet
- Purina pet food
- Frontline Flea & Tick
- Heartgard
- Interceptor
- Advantage
- Other (with a free form text box to fill in up to 75 characters)

The Adopter Checklist section will only appear if the Animal has a microchip and is receiving a Gift, or is receiving an Offer. Selecting “None” in the Gift of Insurance section will hide the Adopter Checklist.

The answers will be included on the Adopter Downloads PDF. This text will be placed underneath the current last question on the “Gift of Insurance Messaging Checklist” page.
• Organizations using PetPoint can receive discounts on many things already used and order them online from **Staples’ Office and Janitorial Supply Program**, including business-window envelopes that perfectly fit PetPoint’s contracts.

• We have updated the list.
Reports
Website
Several changes have been made to the Receipt: Cash Drawer Closing report found on the Reports Website.

- Credit Card Type is now specified

<table>
<thead>
<tr>
<th>Receipt #</th>
<th>Receipt Date</th>
<th>Cash Drawer</th>
<th>Payment Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2627281</td>
<td>12/30/2009</td>
<td>Cash Box</td>
<td>Visa</td>
<td>$135.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>PetPoint ID</th>
<th>Item</th>
<th>Account Code</th>
<th>Item Total (After Tax)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Julie Felder</td>
<td>P07678199</td>
<td>Stray</td>
<td></td>
<td>$15.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Adoption</td>
<td></td>
<td>$85.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Adoption - Dog</td>
<td></td>
<td>$40.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cash Donation</td>
<td></td>
<td>$5.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Flea Medicine</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Microchip &amp; Registration 24Pet</td>
<td></td>
<td>$10.00</td>
</tr>
</tbody>
</table>

- Close Date Start/End is no longer selected by default since users would generally run this report by Close #

Cash Drawer Closing
Thank You