HUMAN ANIMAL SUPPORT SERVICES

Intake Triage Project

Digital Form Content

DOCUMENT KEY

- Bullet points = multiple choice (single) response options
- Checkboxes = multi-select (check all that apply) response options
- Highlighted colors indicate logic = which pages a respondent completes based on previous responses
- Asterisk (*) = required questions if taken to that branch of the form
- Blue circle (🔵) = to support individuals earlier (**before** the time of intake), incorporate these questions into existing surrender/support request forms (in addition to pet and client details); copy may be edited to suit client-facing platforms accordingly

PAGE DESCRIPTION:

About this Form

- Complete this form during conversations at intake with clients.
- This template document is intended to be programmed into a digital form, like Google Forms or Survey Monkey (both platforms offer free options). For example, copy and view this template Google Form. You can immediately start finalizing your own form!
- Only one form is needed per client, even if there are multiple pets.
- Sample scripts have been entered throughout this form in some question descriptions in *italics*.

[Section 1] Client Information

1. Client's name:*
    - [Short Answer] _____
2. Client's phone number:*
    - [Short Answer] _____
3. Client's email address:*
    - [Short Answer] _____
4. Client's complete address:*
    - [Short Answer] _____

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[Continue to next section]

[Section 2] Basic Pet Information

PAGE DESCRIPTION:
This section does **not** include detailed pet history questions at this time. It is recommended that organizations **capture pet history data in addition** to the following questions.

5. Pet's name:*
   DESCRIPTION: *If multiple pets, enter all names here.*
   - [Short Answer] _____

6. Intake type requested:*
   - [Direct to Section 4: Reason(s) for Requesting Pet Surrender] Owner Surrender
   - [Direction to Section 4: Reason(s) for Requesting Pet Surrender] Return
   - [Direct to Section 3: Found/Stray Pets] Found/Stray
   - [Direct to Section 8: Owner Requested Euthanasia] Owner Requested Euthanasia

7. Number of each species:*

	1	2	3	4	5	6+
Dogs						
Cats						
Others						

[Logic in #6]

[Section 3] Found/Stray Pets

8. Finder's report of pet's physical condition:*
   DESCRIPTION: Selections below represent only brief observations made by finders and do **not** replace the need for a comprehensive veterinary examination or further investigation into the pet's needs.
   - ☐ Appeared healthy
   - ☐ Appeared sick/injured
   - ☐ Unweaned/underaged
   - ☐ Pet appeared to be in physical danger (e.g., in the road)
   - ☐ Finder unable to make determination

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9. Finder's report of the pet's behavior:*
   DESCRIPTION: Selections below represent only brief observations made by finders and do **not** replace the need for a comprehensive veterinary examination or further investigation into the pet's needs and behavior.
   - ○ Appeared friendly
   - ○ Did not appear friendly
   - ○ Finder unable to make determination

10. Has the finder seen this pet before?*
    - ○ Yes, they have seen this pet roaming WITHOUT a person
    - ○ Yes, they have seen this pet WITH a person
    - ○ No

11. How long has the finder been caring for this pet?*
    - ○ 1 day or less
    - ○ Between 1 and 3 days
    - ○ Between 3 and 7 days
    - ○ 7+ days

12. Visual identification the pet had when found:*
    - ○ Collar and/or harness - WITH ID tags
    - ○ Collar and/or harness - NO ID tags
    - ○ No identification

13. Does the finder have any **additional information** to share about their time with the pet?
    DESCRIPTION: Notes on interactions with people or other animals are valuable here, particularly if not captured elsewhere.
    - ○ [Long Answer] _____

14. Finder attempted the following methods to look for the pet's owner:*
    - ☐ Actively looked in surrounding area where pet was found
    - ☐ Filed a found pet report with Animal Services
    - ☐ Had the pet scanned for a microchip
    - ☐ Used contact information from the microchip
    - ☐ Used contact information from the collar/ID tag
    - ☐ Posted animal on social media (e.g., lost and found pet groups)
    - ☐ Searched for this pet's owner on social media (e.g., lost and found pet groups)
    - ☐ Knocked on nearby doors or asked neighbors if they knew the pet's owner
    - ☐ Found litter and did not look for an owner

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- ☐ Did not attempt any methods to locate pet's owner other than coming to shelter

15. If not listed above, any other methods attempted to look for the pet's owner:
    - [Long Answer] _____

16. Finder's willingness to foster:*
    DESCRIPTION: *Many pets are found only blocks away from their homes! By staying in the area they are found, they have a greater chance of finding their family. We're very grateful to have people like you in the community who love animals and want to help. With support and free resources from the shelter, would you be willing to temporarily hold (foster) this pet today?*
    - Yes, for up to 48 hours
    - Yes, for up to 1 week
    - Yes, for longer than 1 week
    - No

[Skip to Section 7: Internal Use]

[Section 4] Reason(s) for Requesting Pet Surrender

PAGE DESCRIPTION:
Conversational approach:

- Complete the following page through a conversation with the client about the **reasons contributing to their surrender request**.
- Not all categories may be relevant. Skip those that do not apply.
- Use this page as a guide to explore more details within major categories if a client suggests a topic below.

Sample script to begin section:

- *We understand that pets may enter the shelter as a result of multiple **human AND animal** factors and that the decision to surrender a pet is a complicated and difficult one. To help us better understand how we can support you, can you please tell me more about your need to surrender today?*

17. 🔵Permanent life change:
    - ☐ New baby
    - ☐ Relationship end
    - ☐ Owner health
    - ☐ Military relocation (long-term)
    - ☐ Owner incarcerated (long-term)

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18. 🔵Owner death:
    - ☐ No next of kin
    - ☐ Next of kin unable to keep

19. 🔵Short-term life change:
    - ☐ Owner incarcerated (short-term)
    - ☐ Military relocation (short-term)
    - ☐ Owner temporarily hospitalized
    - ☐ Domestic violence
    - ☐ Owner going into substance use treatment

20. 🔵Housing:
    - ☐ Loss of home
    - ☐ No shelter/living outdoors
    - ☐ Breed restriction
    - ☐ Restriction on number of pets
    - ☐ Pet size restriction
    - ☐ Cannot find housing that allows my pet(s)
    - ☐ Cannot afford pet fees, pet rent, or ongoing fees

21. 🔵Cannot afford:
    DESCRIPTION: *You mentioned care is expensive, is there a specific aspect of their care that you're referring to?*
    - ☐ Routine wellness
    - ☐ Supplies/license
    - ☐ Pet food
    - ☐ Treatment for illness (non-emergency)
    - ☐ Treatment for injury (non-emergency)
    - ☐ Treatment for illness (emergency)
    - ☐ Treatment for injury (emergency)
    - ☐ Behavior and/or training support

22. 🔵This pet's behavior per owner:
    DESCRIPTION: Utilize this section only if the **owner has stated that this pet's behavior is a reason** for requesting surrender. General behavior history notes (likes, dislikes, preferences, etc.) should be captured outside of this question.

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- ☐ Nuisance behavior (e.g., marking, barking, escapes, scratching furniture, strained pet interactions - non-safety, etc.)
- ☐ Pet-to-pet safety concerns (concerned about *this* pet's behavior with other animals; do NOT select for resident/other pets' behavior)
- ☐ Pet-to-people safety concerns (concerned about pet's behavior with people)
- ☐ Pet needs urgent care/treatment (phobias, advanced fear/distress, etc. that interferes with pet's daily function/welfare/health)

23. 🔵Owner/household factors:
    - ☐ Preference for appearance, size, or breed type
    - ☐ Behavior of other pet(s) in the home
    - ☐ Someone in household is experiencing allergies
    - ☐ Did not specify any other definitive reason for relinquishment

24. 🔵No time/overwhelmed:
    DESCRIPTION: *Can you tell me more about what contributes to a lack of time/overwhelm?*
    - ☐ Took ownership without intent to keep
    - ☐ Unable to fulfill pet's mental/emotional needs (unable to exercise/enrich/care for; unrelated to finances)
    - ☐ Unable to fulfill pet's medical treatment needs (unrelated to finances)
    - ☐ Unwanted litter(s)

25. 🔵Does the client have **any other reasons** for requesting surrender that have not been captured (above)?
    - [Short Answer] _____

26. 🔵**Primary/main reason** client is requesting surrender:*
    DESCRIPTION: *You mentioned multiple contributing factors for needing to surrender your pet today. What would you say is the main reason you need to surrender?*
    - [Short Answer] _____

[Continue to Section 5: Owner Support]

[Section 5] Owner Support

PAGE DESCRIPTION:

Sample script to begin section: *Thank you for sharing that information with me. The next few questions will help us understand what resources may be helpful to you. Some of these resources may be limited or unavailable at this time.*

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27. 🔵What resources could help the client keep their pet today?*
DESCRIPTION: *To assist us in understanding future cases similar to yours, **would the availability** of any of these resources today assist you in keeping your pet?*
    - ☐ Pet food and/or supplies
    - ☐ Low-cost or free veterinary care
    - ☐ Low-cost or free pet training
    - ☐ Low-cost or free temporary boarding
    - ☐ Money for pet deposits
    - ☐ Information on how to find housing that accepts your pet
    - ☐ Information on pet care support (e.g., dog walking, pet sitting, daycare, pet-friendly transportation)
    - ☐ Referral to self-rehoming platforms (e.g., Rehome by Adopt-a-Pet, Home-to-Home)
    - ☐ No assistance would be of use

28. 🔵If not listed above, any other resources that could help the client keep their pet today:
    - [Long Answer] _____

29. 🔵If "Low-cost or free temporary boarding" was selected above, approximately **how many days needed:**
    - [Short Answer] _____

30. Is the client able to keep their pet today?*
DESCRIPTION: *Considering the information regarding the resources offered, **are you able to keep your pet today?***
    - ○ [Direct to Section 6: Support Received] Yes
    - ○ [Direct to Section 7: Internal Use] No

[Logic in #31]

[Section 6] Support Received

31. What resources are supporting the client in keeping their pet today?*
DESCRIPTION: *What resources **offered today** are supporting you to keep your pet(s)?*
    - ☐ Pet food and/or supplies
    - ☐ Low-cost or free veterinary care
    - ☐ Low-cost or free pet training
    - ☐ Low-cost or free temporary boarding

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- ☐ Money for pet deposits
- ☐ Information on how to find housing that accepts your pet
- ☐ Information on pet care support (e.g., dog walking, pet sitting, daycare, pet-friendly transportation)
- ☐ Referral to self-rehoming platforms (e.g., Rehome by Adopt-a-Pet, Home-to-Home)

32. If not listed above, any other resources that are supporting the client in keeping their pet today:
    - [Long Answer] _____

33. If "Low-cost or free temporary boarding" was selected above, approximately **how many days needed:**
    - [Short Answer] _____

[Continue to Section 7: Internal Use]

[Section 7] Internal Use

34. Did the client keep their pet(s) today?*
    - Yes - they did not surrender the pet and intend to keep
    - Yes - they did not surrender and plan to use self-rehoming platform to rehome pet
    - Yes - they agreed to foster the pet for the organization to place
    - Yes - they wanted to adopt the pet (lost pets)
    - No - the pet has an intake record with the shelter

35. Pet's Animal ID from software (if intake occurs):
    DESCRIPTION: If there are multiple IDs, separate with a comma.
    - [Short Answer] _____

36. Client's Person ID from software:
    - [Short Answer] _____

[Submit form]

[Section 8] Owner Seeking Euthanasia

37. What best describes the request for euthanasia?*
    - ☐ Behavior - Owner seeking euthanasia
    - ☐ Medical - Owner seeking euthanasia

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- ☐ End of life - Owner seeking euthanasia

38. Was the owner requested euthanasia service provided by the shelter?*
    - Yes
    - No

39. Additional information provided by client regarding request:
    - [Long Answer] _____

[Submit form]

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