



Data Foundations

Best Practices and Data Tracking Recommendations

Data Entry Best Practices

Maintaining best practices for data entry supports quality data output and reporting to inform organizational health and **data accuracy, integrity, and reliability**. This introductory resource will cover common data entry issues, best practice recommendations for person and pet records, and recommendations for tracking data for specific operations related to the [HASS pathways](#) and more.

Common Data Entry Issues

Review the common data entry issues below to avoid when creating data entry protocols and practices to ensure the best results. [To audit your data and integrate best practices for common data issues and more, reference this guide.](#)

Issue	Why	Example of Issue
System contains redundant and unused fields	- Consistent data reporting is needed to ensure data accuracy when aggregated. - Inconsistent categories of data will not accurately reflect operations.	“DOA” “Dead on arrival” “DOA DOA Stray” <i>All of these are saying the same thing, but only one is needed.</i> <i>Understanding DOA-related data becomes difficult when looked at in aggregate.</i>
Information is tracked in the wrong field or too much information is tracked in a single field	- Consistent data reporting is needed to ensure data accuracy when aggregated. - Inconsistent categories of data will not accurately reflect operations.	“ACO pickup long hold” “ACO pickup under 3 months” “ACO pickup owner arrested” <i>Length of hold, age, and intake reason should all be captured in other fields.</i> <i>Understanding data for ACO pickups becomes difficult.</i>
Address/location data entry is incomplete	- Location data may not be able to be used or accurately mapped for analysis. - Inaccurate or incomplete	“Forest Road, FL” “Near Target and Walmart” <i>The first does not list a street number, city, or zip code.</i>

Issue	Why	Example of Issue
	location data may lead to missed opportunities for reunification. <i>If full address information is unavailable, detailed cross-street data with city and zip codes may be entered. However, this data is less likely to be able to be mapped accurately by software.</i>	The second relies on landmarks and does not include any definitive location data.
Combining dead on arrival and died in care	These are different circumstances that require different interventions and solutions.	
Double counting foster as live outcomes	- Key metrics and calculations will be inflated. - Reporting will be inaccurate.	<i>This is more likely to occur in software that counts foster movement as an intake and outcome. If using software that does track foster movement as an intake and outcome, remove these intakes and outcomes from the data when reporting or doing calculations that depend on intakes and outcomes.</i>
Not counting individual animals or double counting individual animals	- Key metrics and calculations will be inflated. - Reporting will be inaccurate. - Animals may be missed and not accounted for.	Example: A litter of five kittens entered into the software is counted as one intake and then processed in the software as five outcomes. Every individual animal should have its own intake and outcome record.
Delayed data entry/entry is not reconciled daily	- Reporting will be inaccurate, especially for length of stay calculations. - Inventory will not reconcile. - Animals may be missed and not accounted for. - Critical details may be lost/forgotten.	Example: Data entry is done from paper intake and outcome forms weekly instead of at the point of intake and outcome, but the information is not backdated to the appropriate date and time.

Best Practices by Operation Type

The following sections detail data tracking best practices based on operation types. For support with common animal welfare terminology, [see our guide here](#).

Animal Records

Individual animal records should, at minimum, include the following data points for detailed record-keeping and case management practices:

Data Point	Definition	What it Serves
Unique identifier	A unique number or code that is generated for each individual record. Also referred to as animal number or animal ID.	Unique record tracking and case management.
Name	The animal's name.	Identification of the animal by name.
Picture	A picture of the animal.	Visual identification of the animal.
Associated people	Person records associated with the animal record such as through ownership, intakes, and outcomes.	Tracks history of ownership, surrender, reclaim, adoption, and similar operations by connecting a pet to a person. Supports pet support services tracking, case management, and potential lost pet reunification.
Associated operations and services	Operations and services associated with the animal record such as participation in pet food pantry and veterinary services programs.	Supports pet support services tracking, case management, and program development.
Intake date	Date animal was taken into shelter care.	Tracks history of intakes. Essential intake operations data. Required to determine legal holding period.
Intake type	Intake category assigned to an animal when they are taken	Essential intake operations data to categorize types and

Data Point	Definition	What it Serves
	into shelter care, such as “Stray/At Large” or “Relinquished by Owner.”	volume of animals taken into care.
Intake subtype	Intake subcategory is assigned to an animal when they are taken into shelter care.	Essential intake operations data to categorize types of animal intakes.
Intake condition	Physical condition of animal at intake.	Documentation of care needs.
Intake reason* <i>*Though not all shelter software offers a dedicated field for this data point, there should be a standard process to capture this information, even if in an alternate field.</i>	The reason an animal was taken into shelter care.	Informs pet support services needs, program development opportunities, and case management for intake-to-placement pathway planning.
Found location, if applicable (Stray/At Large)	The complete address where the pet was found at large. <i>If full address information is unavailable, detailed cross-street data with city and zip codes may be entered. However, this data is less likely to be able to be mapped accurately by software.</i>	Supports lost pet reunification and the ability to map data for analysis to inform support needs and program development.
Hold dates	The date range that a pet is on hold due to legal requirements, such as a Stray Hold, or while pending other operations such as a planned adoption or transfer-out placement. <i>Hold release dates for legal requirements may also be referred to as emancipation dates.</i>	Informs pets pathway planning and the date that must pass before the pet can continue on various pathways.
Housing location on site	The location at the shelter where the animal is housed. Examples: kennel #, room name.	Informs population management and identifies pet's location.

Data Point	Definition	What it Serves
Species	Species of the animal.	Essential animal demographic information used for identification, pathway planning, population management, etc.
Age	Age of the animal, even if estimated.	Essential animal demographic information.
Weight	Weight of the animal per scale. This is best taken at the point of intake and again at the point of veterinary care if applicable.	Essential animal demographic information.
Size	Size group of animal based on weight and age.	Essential animal demographic information.
Date of birth	Date of birth for animal, even if estimated.	Essential animal demographic information.
Breed	Breed reported or assigned to animal. <i>Some software may be set up to record "mixed breed," "unknown," or "looks like" data in this field. It is recommended not to use "unknown."</i>	Essential animal demographic information. This information can be used to identify rescue placement and other pathway options.
Gender/sex	Gender/sex of animal.	Essential animal demographic information.
Color/coat description	Color(s) and coat type of the animal.	Animal demographic information used for identification.
Intake altered status	Status of spay or neuter at intake.	Informs veterinary care needs, program development opportunities, and animal demographic information.
Medical records	Medical/veterinary records for the animal. Should include records from the animal's time in shelter care and may include pet history details collected from a former	Informs care needs and case management for intake-to-placement pathway planning. Provides key documentation to

Data Point	Definition	What it Serves
	owner/organization.	be shared with the person the animal is released to.
Behavior records	Behavior records for the animal should include notes from the animal's time in shelter care and may include pet history details collected from a former owner/organization/finder.	Informs care needs and case management for intake-to-placement pathway planning. Provides key documentation to be shared with the person the animal is released to.
Pet History	Data on the pet's history collected from a former owner/organization/finder. Often includes details regarding a pet's likes, dislikes, medical history, and behavior.	Informs care needs and case management for Intake to Placement pathway planning. Provides key documentation to be shared with the person the animal is released to.
Outcome date	Date of animal's outcome/release from shelter care.	Essential outcome operations data to categorize types and volume of animals leaving care.
Outcome type	Outcome category assigned to an animal when they are released from shelter care, such as "Adoption" or "Return to Owner."	Essential outcome operations data to categorize types of animal outcomes.
Outcome subtype	Outcome subcategory assigned to an animal when they are released from shelter care.	Essential outcome operations data to categorize types of animal outcomes.
<i>All fields detailed in "Pet Microchips." section. See for more details.</i>		

Intakes, Outcomes, and Animal Counts

Every animal should be counted regardless of the reason for intake, outcome, or service. Basic data tracking for pets in care and pets receiving services should include all of the following metrics on a monthly and yearly basis, at minimum, with daily inventory ("animal counts") reconciled in the software daily.

Intake Types	Cat	Dog	Other	Total (All Species)
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Stray/At Large				
Relinquished by Owner				
Returned to Shelter				
Transfer-In				
Seized/Confiscated				
Owner Requested Euthanasia (ORE)*				
Clinic/Service In**				
Total Live Intake:				
Live Outcomes	Cat	Dog	Other	Total (All Species)
Adoption				
Return to Owner (RTO)				
Transfer-Out				
SNR (differs from TNR***)				
Other Live Outcomes				
Total Live Outcomes:				
Other Outcome Types	Cat	Dog	Other	Total (All Species)
Died in Care*				
Euthanized*				
Missing/Lost/Stolen				
Clinic/Service Out**				
Total Other Outcomes:				
	Total Cats	Total Dogs	Total Other	Grand Total
Animal Counts	Total in Care Onsite	Total In Foster Care	Grand Total	
Beginning Count				
Ending Count				

**Every animal is counted regardless of the reason for intake, outcome, or service.*

***Clinic/Service In and Out data is often tracked in conjunction with data points in the Pet Support Services category and may not contribute to live intake/outcome totals.*

****TNR recommendations can be found in the Pet Support Services Operations section.*

Person Records

Individual person records should include the following data points for detailed record-keeping and case management practices:

Data Point	Definition	What it Serves
Unique identifier	A unique number or code that is generated for each individual record. Also referred to as person number or person ID.	Unique record tracking and case management.
Name	The person's first and last name.	Identification of the person by name.
Address	The person's complete address.	Location data which may inform programming and development.
Contact information	The person's phone number and email address.	Methods to contact the person.
Status/Association	A tag added to the person record that identifies their relationship to the organization such as foster, adopter, staff, etc.	Provides an understanding of how people are interacting with the organization.
Associated pets	Animal records associated with the person record such as through ownership, intakes, and outcomes.	Tracks history of ownership, surrender, reclaim, adoption, and similar operations by connecting a pet to a person. Supports pet support services tracking, case management, and potential Lost Pet Reunification.
Associated operations and services	Operations and services associated with the person record such as participation in pet food pantry and veterinary services programs.	Supports pet support services tracking, case management, and program development.

Pet Microchips

Microchip information offers critical data to support the identification and reunification of pets.

Data Point	Definition	What it Serves
Microchip scan	The results of scanning a pet for a microchip:	Informs the number of animals coming in with microchips and whether the microchip tracing

Data Point	Definition	What it Serves
	• Yes = has a microchip at time of intake/point of contact for found pet examination • No = does not have a microchip at time of intake/point of contact for found pet examination • Unknown = did not scan the pet	process can begin. This is separate from the microchip number, since the purpose is to tell whether a microchip existed prior to intake.
Microchip number	The unique number assigned to a pet's microchip.	Unique identification of a pet by microchip number.
Microchip tracing	Details regarding the pet ownership information located on the microchip and contact attempts.	Case management and reunification.
Microchip issue/implantation date	The date a microchip was issued/implanted in a pet.	Documents the medical procedure date when a microchip was implanted. Informs the number of animals coming in with microchips and the number of microchips being issued by the organization.

Lost and Found Reports

Standardizing the data collection and follow-up process for lost and found reports is key to listing lost and found pet details online to support reunification, showing the support provided to finders, and demonstrating the number of pets kept out of the shelter through reunification efforts.

Data Point	Definition	What it Serves
Person record	The person record associated with the finder or owner of a lost/found pet.	• Person-level tracking for lost and found data • Informs reunification efforts • Tracks the support provided to finders and demonstrates the number

Data Point	Definition	What it Serves
		of animals kept out of the shelter via reunification made by finders.
Animal record	The animal record associated with the pet who has been lost or found.	• Animal-level tracking for lost and found data • Informs reunification efforts by listing animal details in a searchable/viewable database • Tracks the support provided to finders and demonstrates the number of animals kept out of the shelter via reunification made by finders.
Lost/found location	The complete address where the pet was lost or found. <i>If full address information is unavailable, detailed cross-street data with city and zip codes may be entered. However, this data is less likely to be able to be mapped accurately by software.</i>	Supports lost pet reunification and the ability to map data for analysis to inform support needs and program development.
Outcome	The outcome of the report, such as: • Reunited by finder • Brought to the shelter • Unknown outcome	Documenting outcomes provides greater data on program efficacy and future development needs.
Date and time reported	The date and time a pet was reported to be lost or found.	Captures the amount of time an animal is lost/found. This information can lead to a better understanding of how quickly an animal is typically reunited.

Foster Operations

Tracking foster program operations data provides valuable insights into this life-saving program. The following foster data should be tracked for each foster placement:

Data Point	Definition	What it Serves
Foster caregiver	The person record of the foster caregiver, also known as a foster parent.	Identifies a pet's foster caregiver.
Animal record	The animal record for the pet being placed into foster care.	Identifies a pet in foster care.
Foster start date	The date a pet was placed in foster care with a new caregiver.	Informs length of stay, or number of days, in foster care and the number of foster engagements during a given date range.
Foster end date	The date a pet's foster engagement ended.	Informs length of stay, or number of days, in foster care and the number of foster engagements during a given date range.
Foster placement reason	The reason a pet was placed in foster care.	Data for program reporting and development, case management for the pet.
Foster end (outcome) reason	The reason a pet's foster engagement ended.	Data for program reporting and development, case management for the pet.

Volunteer Operations

Tracking volunteer program operations data provides valuable insights necessary for building a thriving, engaged volunteer community. Track the following data points for volunteer operations:

Data Point	Definition	What it Serves
Dates of service	The date a volunteer became "active" and "inactive."	Informs volunteer program size, conversation rate, and retention rate.
Volunteer hours served	The number of hours served per individual volunteer and in	Informs key program indicators/metrics (KPIs).

Data Point	Definition	What it Serves
	aggregate.	
Volunteer Retention Rate	The percentage of volunteers still active within one year of their start date.	Informs volunteer retention and satisfaction.
Volunteer Conversion Rate	The percentage of volunteer applicants who became active volunteers.	Informs volunteer recruitment strategies.
Volunteer Satisfaction	Annual survey to gather volunteer feedback.	Identifies programmatic wins and opportunities.
Volunteer assignments or roles	The assignment or role where the volunteer is serving, such as in animal care or administration.	Informs engagement with available volunteer assignments and roles.
How volunteers first hear about the organization	How volunteers first hear about the organization, such as on social media, website, word of mouth, etc.	Informs volunteer recruitment strategies.

Pet Support Services Operations

Tracking data on pet support services operations can inform pets diverted from possible shelter intake, pets and people served in the community, program efficacy, program funding and resource needs, and overall program development.

Consider the following questions when setting up your pet support services tracking system:

- **Who** needs to be notified of case management alerts along the person and animal's pathway?
- **What** is the end goal of tracking?
- **When** do notifications/alerts need to occur for follow-up?
- **Where** will data be entered and referenced?
- **Why** is pet support services tracking important to your organization and stakeholders?

*****TNR (Trap-Neuter-Return) consideration:** As TNR is primarily an external process whereas the organization providing medical services does not intake the pet into their care, TNR may be best suited to be considered a "pet support service" for data tracking purposes.

In addition to the following data points, consider utilizing [this guide](#) and the [HASS Tools and Technology White Paper: Community Request Tracking](#) for additional support documenting case management efforts for customer interactions and support services.

Data Point	Definition	What it Serves
Person record	The person record associated with the service request.	Supports pet support services tracking, case management, and program development.
Animal record	The animal record associated with the service request.	Supports pet support services tracking, case management, and program development.
Case record	A unique record to track all case activity associated with the person and animal(s) for the service request.	Supports pet support services tracking, case management, and program development.
Date of request	The date of the request.	Tracks history of requests.
Reason for request	The initial reason service was requested or recommended.	Informs service needs and program development.
Case management notes	Additional documentation to support the individual needs of the case.	Informs service needs and individualized support.
Services provided or recommended	The services provided or recommended.	Informs service needs and program development – and whether the final service provided or recommended differed from the initial reason for the request.
Follow up	Documentation of follow up/check-ins, often at set intervals (i.e. 7 days) after the initial request.	Informs case management, individualized support, and the pathway of the pet.
Outcome of request	The outcome or resolution of the request, such as kept, rehomed, or surrendered pet.	Informs program efficacy and the pathway of the pet.
Date of outcome/case resolution	The date of the request outcome/case resolution.	Tracks history of service requests. Identifies active vs. non-active cases.
Vouchers for free/discounted services	Documentation of vouchers issued or redeemed for free and discounted services.	Records use of services and informs service needs.

Data Point	Definition	What it Serves
Paid services transactions	Documentation of payment for services; receipts; transaction history.	Records use of services and informs service needs.

Supported Self-Rehoming Operations

Tracking data on supported self-rehoming (SSR) operations can inform the number of pets diverted from possible shelter intake, pets and people served outside of the shelter, the outcomes of pets who participate in this program, and program development needs. This tracking often occurs in third-party self-rehoming platforms or alongside other pet support services tracking (*detailed above*).

Self-rehoming platforms often offer data tracking and reporting options that require little effort from shelter staff and primarily focus on user-generated data entry from pet owners. Some of the leading **self-rehoming platforms** include the following:

- [Rehome by Adopt a Pet](#)
- [Home to Home Animal Adoption](#)
- [Get Your Pet](#)

Additionally self-rehoming platforms are available on a variety of social media channels. Organizations may wish to moderate or create groups/pages on **social media**:

- [Facebook](#)
- [Nextdoor](#)

While the bulk of supported self-rehoming data can be captured on dedicated platforms, organizations may wish to track data regarding **owners who contacted the shelter and when** supported self-rehoming was offered. For more information on documenting case management efforts for customer interactions and support services, see the [HASS Tools and Technology White Paper: Community Request Tracking](#) and “Pet Support Services Operations” section above.

When documenting **supported self-rehoming data in your support services tracking system**, collect the following details:

- How the owner heard about your organization or the SSR platform
 - *Social media, word of mouth, website, etc.*
- Outcome or resolution of the SSR post
 - *Successful or unsuccessful? Was the animal adopted or did the original owner keep the pet? Was the post removed due to inactivity?*
- Initial post date and outcome date
 - *The time it takes to self-rehome an animal*
- Types of assistance offered by the shelter
 - *Assistance with advertising, behavior resources, post-adoption resources/services, etc.*
- Types of assistance the shelter could not provide, but were needed

- *This helps inform the gap between what is needed and what is available to drive programming decisions and funding proposals.*

Supporting Resources

- [Shelter Jargon Mini Manual](#)
- [Identification and Solution Integration for Common Data Issues](#)
- [System and Software Recommendations to Track Organizational Data](#)
- [HASS Tools and Technology White Paper: Community Request Tracking](#)