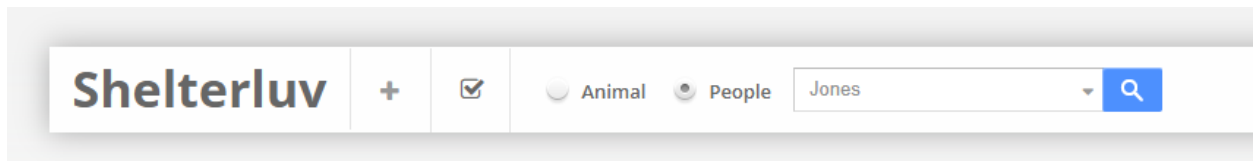# ShelterLuv Adoption Procedure


Finding/Creating the Adopter's Person Record

- Search for the person who is adopting. (I suggest only their first name or last name to lessen the chance for typos) Be sure that the Person bubble is selected.

-OR-

on ShelterLuv's main animal viewing page, sort by the animal status by clicking the **Status** heading and finding cats marked **Ready to Adopt**.


If their chosen animal is marked **Ready to Adopt**, click the animal name to open the animal profile and you should see the foster to adopt person's name in blue under **Location:** next to the animal's picture. Click the person's name and continue with the adoption process.
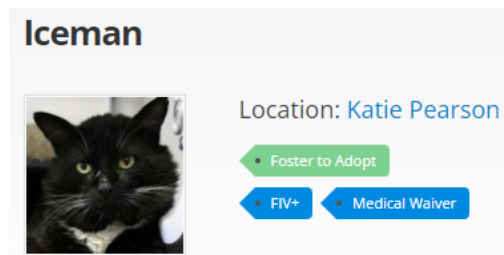
*If there is a pop-up memo stating **Stacey Only Adoption**, Stacey has been working with these adopters and she should be the only one to complete these adoptions, let her know by emailing Stacey@asapcats.org if someone with that memo is asking to complete the adoption*

- If the person is not there or is not attached to the animal they are adopting, ask if they have submitted an application in ShelterLuv. If they have, click on the **gear icon** at the top right of the screen and choose **Application Manager**.
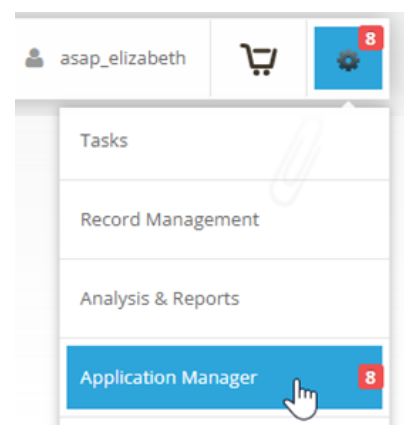
- Look for their application either by scanning the applications or using the search bar. Check the **Pending Review** tab, the **In Process** tab, and the **Archived** tab until you find their application.

| Pending review | In Process | Accepted | Denied | Archived |

Search :

- Once you find their application, click on the person's name and the application will open on the right side of the page under **Application Review**. Check that the application includes their address, phone number, physical address, and drivers license number as well as reviewing their answers to guide you in your matchmaking conversation.

- Once you approve of the adopter, click **Accept** and choose **Create Record** from the drop down menu. This creates the person's record in ShelterLuv.

Application Review

Review comments

✔ Accept ▾ | Mark In Process | ✖ Reject ▾ | Archive ▾

Create Record

Create Record and Email Applicant   10:44 PM

- If they have not submitted an application in ShelterLuv, ask them to do so using their phone, the volunteer laptop, or one of the tablets. If they are unwilling to fill out the application you can create their Person record for them.

- To create a Person record, you must always first search for the person. (I suggest only their first name or last name to lessen the chance for typos) Be sure that the Person bubble is selected. When ShelterLuv cannot find the person, you may then create them by clicking either

Add New+

Person Search Results

Add New+
☑ show exact spelling matches only

or **create a new person?**

Person Search Results

☑ show exact spelling matches only

Nuts! We couldn't find any people using " Jofefe ".

Did you mean to search for an animal? If so, change the radio button by the search bar.

Or did you mean to search by phone number? If so, remember to add "Phone:" in front of the number.

Or, Would you like to create a new person?

- ○ Create a Person

    - ■ Fill in all required fields with the red asterisk * and any additional information you may have

    - ■ Click **Save**

Processing the Adoption

- ● Once on the person's profile, click on the **Animals** tab

- ● Click **Add Animal** dropdown and select **Adopt**

- ● Search for the animal being adopted, once found click the **Adopt Now** dropdown and select **Shelter Adoption**

    - ○ If adopting multiple animals, search for next animal and repeat until all animals are selected

- ● Click **Checkout**

Checkout

- Verify and all cats are added and their pricing is correct. *

  - If the person wants to pay by sending in a check, discount the adoption fee in the "Special Discount" section and when prompted later to input a transaction meme, indicate that the person will be sending a check.

Price	Special Discount	Remove
$ 75.00 ✎	- $ ☐	✖

in

- Click **Pay with ShelterPay**

  📱 Pay With Shelterpay

  Pay With cash/check
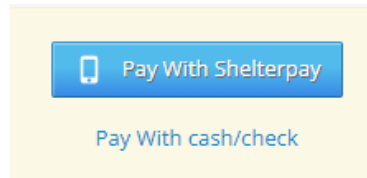
- You can ask if they'd like to donate on top of the adoption fee and enter that amount in the corresponding box, either way donation or not, click **Okay**

- This box will appear, check that it is the correct phone number to send the checkout text message to, if not or they want to use a different phone number you can type it in, then click **Text Link**

  - If the person cannot do the process on their phone, you can select "Customer has no phone" and walk them through the process but completing the steps on your computer or tablet

How Will You Process Transaction? ⑦

Send this transaction to Grace's smartphone where they can review, sign, and pay.

Grace's Cell Phone:

+18055160049

Customer has no phone ⑦
Use separate card reader ⑦

Cancel   Text Link

4

Adopter's End

- The adopter will receive a text with a link they need to click to open

- First they will see the cat(s) they are adopting and the adoption fees, they will click **Next** to proceed

- They will read the adoption contract and select the **I agree** box at the bottom then click **Next**

- The adopter will sign with their finger in a signature box, select the **I have read and agree to the terms and conditions** box, and click **Next**

- Next they will be shown an add for purchasing MetLife pet insurance, we are not adding this add it comes directly from ShelterLuv and we cannot remove it, if they do not wish to purchase the insurance at this time they can scroll all the way to the bottom on the page and click **I deline and acknowledge that I am responsible for all medical expenses for my new pet**

- Next they will be asked if they would like to donate to our shelter, either once or monthly,they can select what they would like and if they do not wish to donate at this time scroll all the way to the bottom and click **No thanks, I do not wish to donate**

- They will then be at the payment screen. Here a percentage of their adoption fees is automatically added to help cover our processing fees (it usually comes to around $5 per cat). If the adopter does not want to add that additional percentage they just uncheck the box next to the bolded dollar amount. Then they'll enter their card information for payment, and click **Submit Payment**.

- Their checkout is now completed and they have an offer of a $15 off Chewy discount if they wish to sign up for it

SHELTERLUV

Pay

Abner
Adult Cat $75.00

✓ **$5.02 has been added** to help cover our fees. Thank you from the ASAP Cats team!

Subtotal $80.02
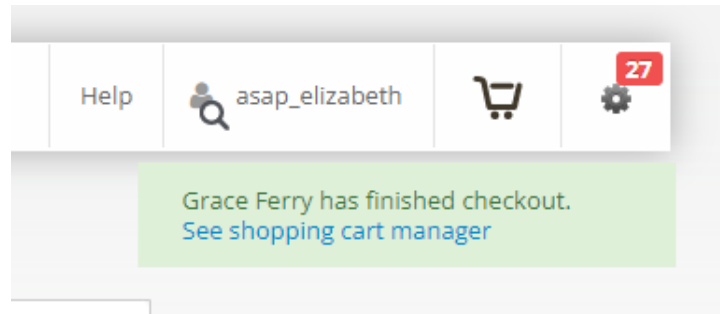Tax $0.00

Total $80.02

Credit Card Number

0000 0000 0000 0000

Month   Year   CVV

MM   YYYY   CVV

Zip

ZIP

ⓘ Please note that this charge will appear as "STAX *ASAP Cats" on your credit/debit card statement.

Submit Payment

ShelterLuv Completion

- On ShelterLuv, you will see a pop up that the adopter has finished their checkout


- You can click **See shopping cart manager** on the pop up notification (it will show for only a moment) or you can click the **cart logo** then **Shopping Cart Manager**

- Click **Complete Transaction**, add a memo if needed, click **Continue**

- You will now be prompted to send the adopter medical records and additional resources, click the checkboxes next to what you wish to send them. We would like the following sent to every adopter:

  - Receipt
  - Adoption Contract
  - Complete Medical History
  - Rabies Certificate (if available)
  - Spay/Neuter Certificate (if available)
  - Disclaimer (if any)
  - Kitten or Adult Cat Adoption Packet (based on age)

  - ATTACHMENTS (if any, see below for instructions)

  Additional handouts will be made available and can be sent as needed, for example someone adopting a Tiny Lion graduate should get the Tiny Lion Handout.

- Click **Send** and the checkout is complete!

Sending attachments

- can only be done from the animal's profile. If there are attachments you will see a paperclip WITH a paper behind it on the right side of the page.
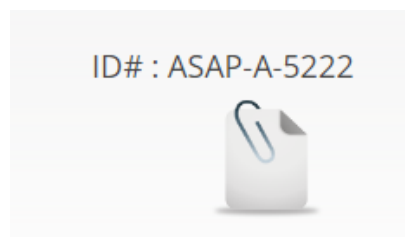
- Click **Email Attachments** and select which attachments you want to send. You will need to assess which attachments to send, though it will usually be okay to send all attachments. They usually consist of past medical records or blood work we have done. SURRENDER PAPERWORK OR ANYTHING WITH THE PREVIOUS OWNERS INFORMATION SHOULD NOT BE SENT!

- Enter the adopter's email and click **Send Mail** (you can easily find the adopter's email by checking the animal's **History** tab, the adopter is now listed as the associated person)

Records for Animal Services

- We must submit our adoptions to be finalized by animal services, to do this go to the adopted animal's profile

- Click the paperclip with the paper or the lone paperclip

- Click the printer icon next to the **Complete Medical Record** to open the record

- Click the download icon on the right hand top of the page

- Save the document as - **Animals name A######** - where the numbers are the animal's **Previous Shelter ID**. For example, the below would be saved as   **Sparky A503533**

Complete Medical

Animal
Sparky (ASAP-A-5010)
Domestic Shorthair Cat
Point Orange
Neutered Male
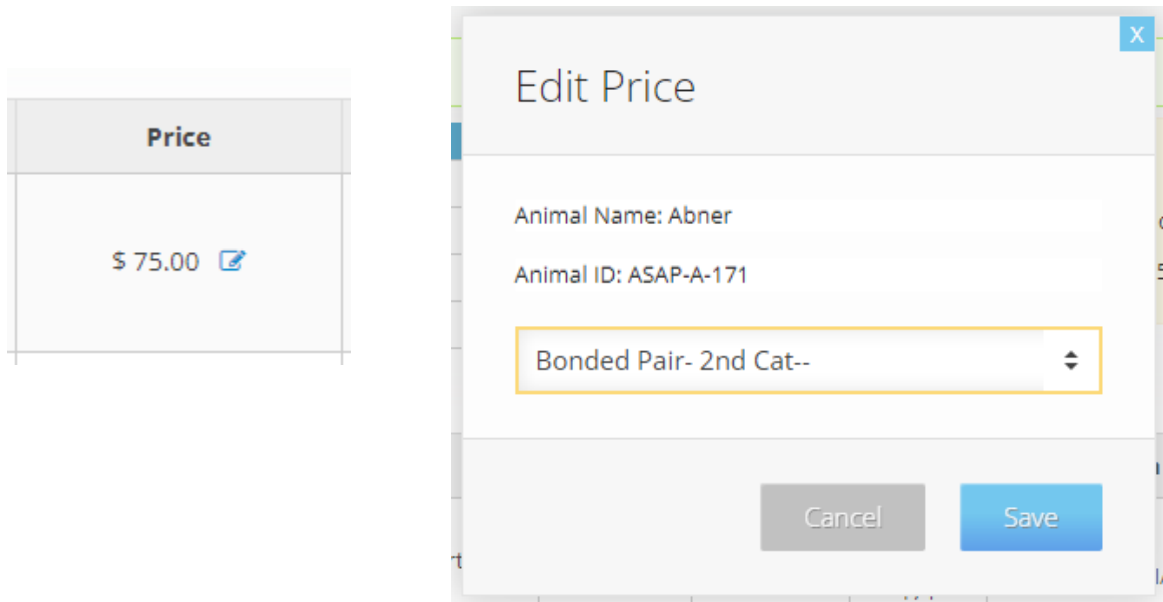4 months, 12 days old (DOB: 08/22/2022)
3.44 lbs on 11/10/2022

ID Numbers

Microchip #	Issued By
981020002644916	Found Animals

Previous Shelter ID #	Type
503533	--

- Email all records for animal services to CompletedAdoptions@asapcats.org to be forwarded to animal services and notify the necessary parties of the adoption.
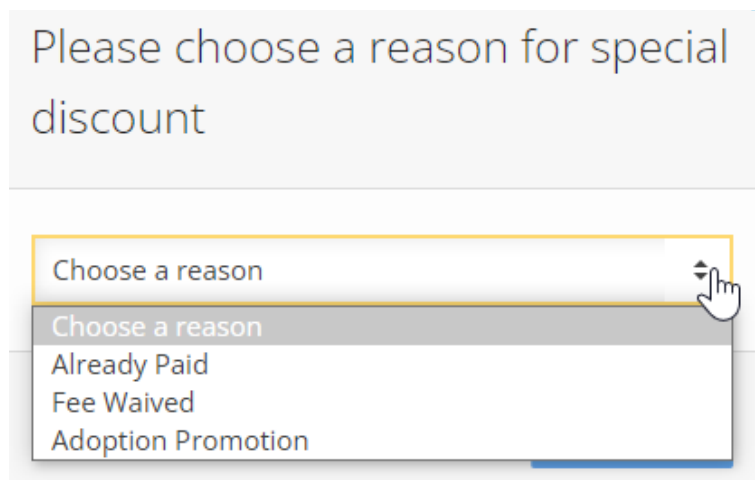
*2 for 1 kittens and **Bonded Pairs**

- In both of these scenarios, only one adoption fee of $75 is charged. If the cats are bonded pairs, they should already be set to charge one cat at $75 and the other at $0. If for some reason they are not set up already or a person is adopting 2 kittens who aren't bonded, when you are checking the cart before sending it to the adopter you will see both cats/kittens being charged at $75. To adjust this, click the **edit symbol** next to the price of one cat/kitten and adjust it to the **Bonded Pair - 2nd Cat – option**. This will make that second cat/kitten free.

*Adoption Discounts/Specials or Check/Cash Payments

- On the checkout page, enter the amount of the special discount, up to the full adoption fee. Use the full adoption fee amount if they are paying by check or cash so they are not prompted to pay again when signing the contract. You may need to do some math if you are going for a set price and not an amount discounted.

- Click **Continue to Payment**. A pop up asking for the reason for the discount will appear, select the most accurate reason for the discount. If they are paying by check or cash, use **Already Paid**

Foster To Adopt

Moving Animal to Foster to Adopt

- Find or create the person according to **Finding/Creating the Adopter's Person Record** above.

- Once on the person's profile, click on the **Animals** tab

- Click **Add Animal** dropdown and select **Foster**

- Search for the animal moving to foster to adopt, once found click the **Foster** dropdown and select **Foster to Adopt**

  - The following pop up may show, if it does simply click **Proceed**. All this means is we are putting an animal into a home that is not one of our regular established foster homes

- Click **Complete Foster**

- If moving multiple animals, search for the next animal and repeat.

- Once completed, return to the animal's profile, click the **Processing** tab, click **+Add Review Date**
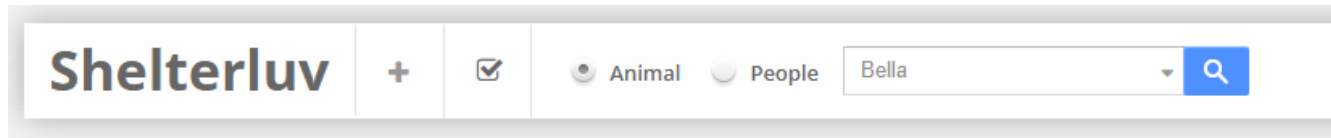
- Enter a Review date two weeks out from the date they go into Foster to Adopt, click **Update**

If the animal is still listed with another foster person, you will need to return the animal and can then place it in Foster to Adopt or process the adoption.
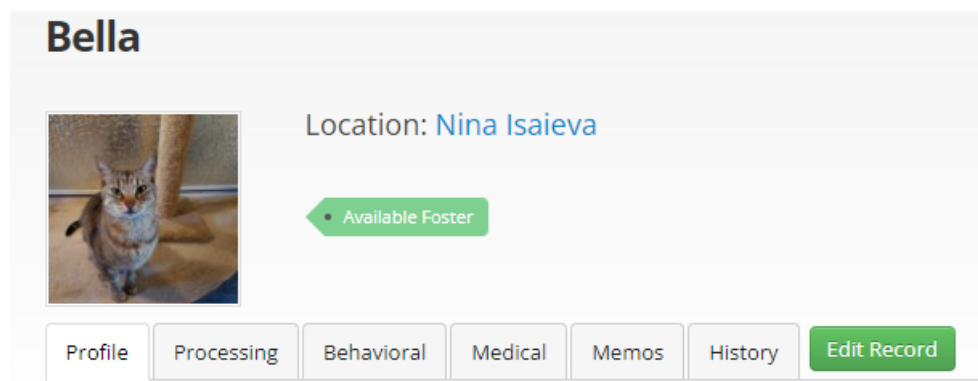
Find the Foster Animal and Foster

- Search for the cat you wish to transfer. Be sure that the Animal bubble is selected.

- Click on the animal's name to open the animal's full profile. Then click on the foster's name located next to "Location" This brings you to the foster's profile.
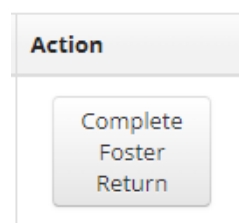

Transferring or Returning the Animal

- Once on the person's profile, click on the **Animals** tab

- Find the animal(s) you want to transfer or return to the shelter and on the far right, click **Select** and then **Return Foster**. You can do this for all animals you wish to return to save time.

Photo	Date	Species	Name	Breed	Color	Animal ID	Event	By	Action
	04/17/2023	Cat	Bella	Domestic Shorthair	Brown/--	ASAP-A-5338	Foster	asap_elizabeth	Select ▾
									Return Foster

- Once all desired animals are selected, Click **Complete Foster Return** on any one of the animals.

Action
Complete Foster Return

- Fill in all required information (sections marked with a red asterisk *)
    - Date returned
    - Intake into
        - If returning to the shelter or transferring to a foster to adopt home, select **Shelter**
    - Returned location site
        - If returning to the shelter or transferring to a foster to adopt home, select **Shelter** > the room they are going into - use **Main Room** for foster to adopt
    - Status upon return
        - If returning to the shelter to adopt or put into Foster to Adopt, use **Adoptable**

Intake into

Shelter

Returned to location *

Shelter

Main Room

Status Upon Return*   Why this list?

Adoptable

- or -

Intake into

Foster

Foster Parent *

Crystal Godwin

463 Pacific Oaks Road, Goleta, CA, 93117

Current Status *

Available Foster

- If moving multiple cats to the same place, click the box on the bottom left to apply the move to all animals you have selected.

☑ Apply this form to all foster animals being returned