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Please note:

The website is currently in Beta meaning we are still improving and testing the website. These instructions are for Beta mode and are subject to change as we improve the site and add new features.

Thank you.

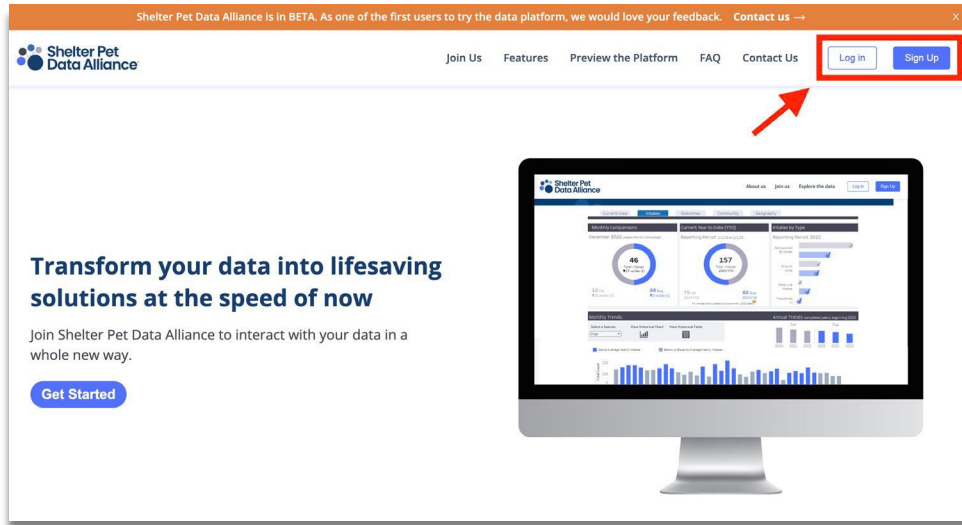
Updated 7.29.2024

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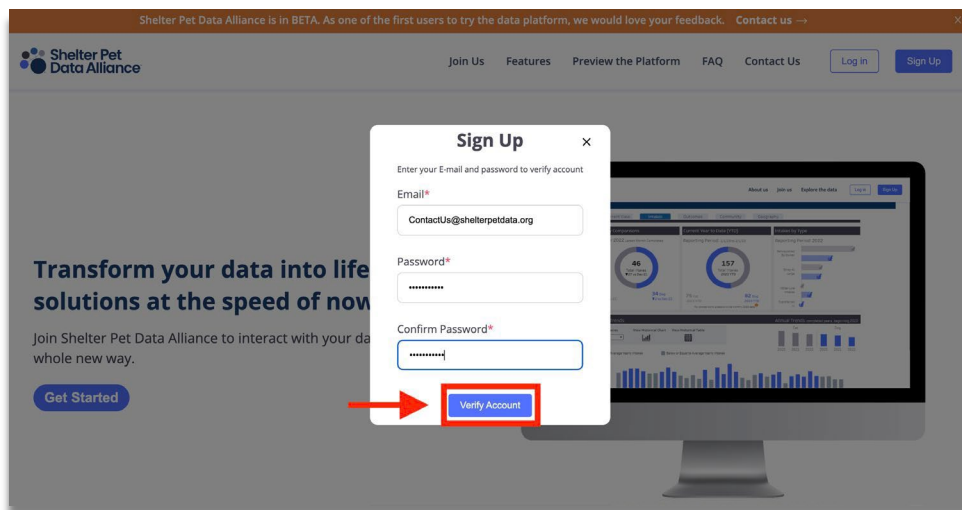
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Creating an account and organization profile in Shelter Pet Data Alliance

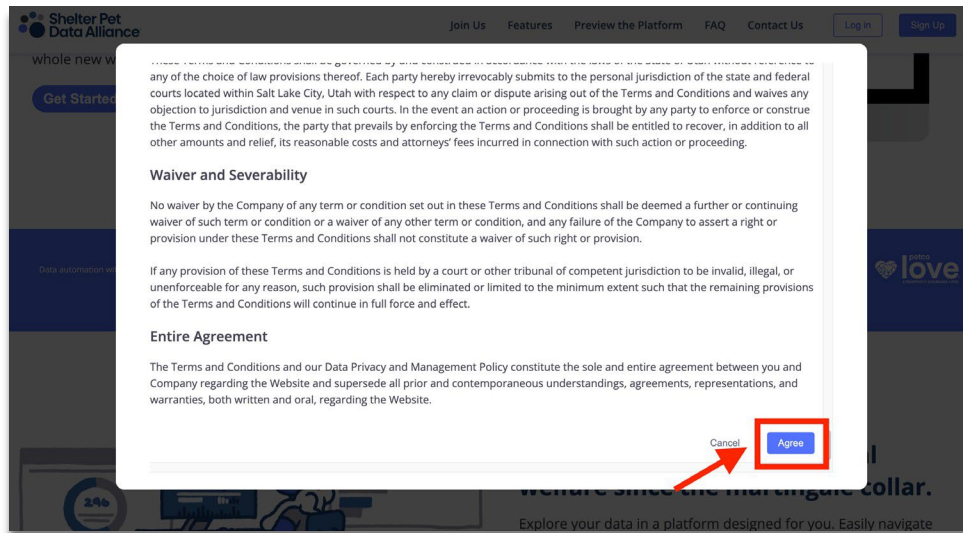
1. In your internet browser, type **shelterpetdata.org** in the address bar.
2. Click **Sign Up** on the upper right corner of the page.



3. Enter your email address and **create** a password.
4. Click **Verify Account**.



5. Review and agree to the Shelter Pet Data Alliance Terms and Conditions of Use. You must scroll to the bottom of the agreement to see the **Agree** button.



6. Check your email inbox for the verification email and click on **Verify Email Address**
7. You will be automatically directed back to the website. **DO NOT STOP HERE**
8. Click on **Log In** and input your username (email) and the password you created in step 3, then click **Log In**.
9. On the **Create Your User Profile** page, the first four fields will be used to create your user profile. Please fill in all required fields.

A screenshot of the "Create Your User Profile" page, Step 1 of 3. The form includes fields for First Name*, Last Name*, Job Title*, Phone Number*, and Ext. A red circle highlights the "Search for your organization by EIN" section, which includes an EIN input field with an example "Ex: 123456789 or 12-34567" and a blue "I Do Not Know EIN" button. A red arrow points to the "I Do Not Know EIN" button. Below the form is a message: "If your Organization is not listed we will guide you through the next steps to add new organization". At the bottom are "Org Not Found" and "Confirm" buttons.

10. The **"Search for your organization"** section will be used to determine if your organization already has an account in Shelter Pet Data Alliance. The preferred way to search for your organization is by using the EIN. If you don't know the EIN for your organization, click the **"I Do Not Know EIN"** button to search by state and/or zip code.

Search for your organization by EIN

EIN

Ex: 123456789 or 12-34567

Search for your organization by State and/or Zip Code

State

zipcode



If your Organization is not listed we will guide you through the next steps to add new organization

Org Not Found

Confirm

11. Find your organization in the list or complete the steps to create a new organization profile.
 - a. Your organization may already be in our system and **have** a Shelter Pet Data Alliance account. If it is, it will appear in the search box. Click the circle to the left of the EIN to select it. Then click confirm to request access. An email will be sent to all current administrators of the account, and they will be able to accept or deny your request to join the organization's account.
 - b. Your organization may already be in our system and **not have** a Shelter Pet Data Alliance account. If this is the case, it will appear in the search box. Click the circle to the left of the EIN to select it. Then click confirm and create your organization profile by filling in all required fields in Step 2. Click Next.
 - c. Your organization may not be in our system. If you've conducted a thorough search for your organization and it does not appear in the list, you will have the option to add a new organization by clicking the Org Not Found button. Fill in all required fields in Step 2. Click Next. *Please note, if your organization is not in our system, and you register, the Shelter Pet Data Alliance support team will need to verify your EIN and organization information. Please allow up to 3 business days for the verification to be completed. In the meantime, you can enter data, but it won't process until you receive the notification that your organization has been verified.
12. For organizations creating a new Shelter Pet Data Alliance account, read and agree to the data privacy and management policy and the authorization to act on behalf of an organization then click **Complete registration**.

Accept/Deny New Users or Add Additional Admins and Users

If you have administrator level access, you'll be able to accept or deny requests for new users to join your organization's Shelter Pet Data Alliance account. You'll be notified of any new requests via email. When you receive a notification, please log in to your account, go to Manage Users, and accept or deny any users with the status of **Pending At Admin**.

The default role is user. If you would like to change any of these users to admins, please click on their name in the Manage Users list, select Edit, and choose Admin in the Select Role field.

*Please note, both the user and admin roles have access to upload data, create new records, view Reporting, and export data from Manage Data. Users do not have access to Manage Users.

Administrators can also add additional admins and users by following these steps.

1. Log in to your Shelter Pet Data Alliance account.
2. On the left side menu, click **Manage Users**.
3. Click the blue **Add User** button on the right side of the screen.

The screenshot shows the 'Add User' form in the Shelter Pet Data Alliance interface. The form is a modal window with the following fields:

- First Name* (text input)
- Last Name* (text input)
- Primary Email* (text input)
- Confirm Primary Email* (text input)
- Job Title (text input)
- Secondary Email (text input)
- Primary Phone Number (text input)
- Extension (text input)
- Secondary Phone (text input)
- Extension (text input)
- Select Role* (dropdown menu with options: Admin, User)

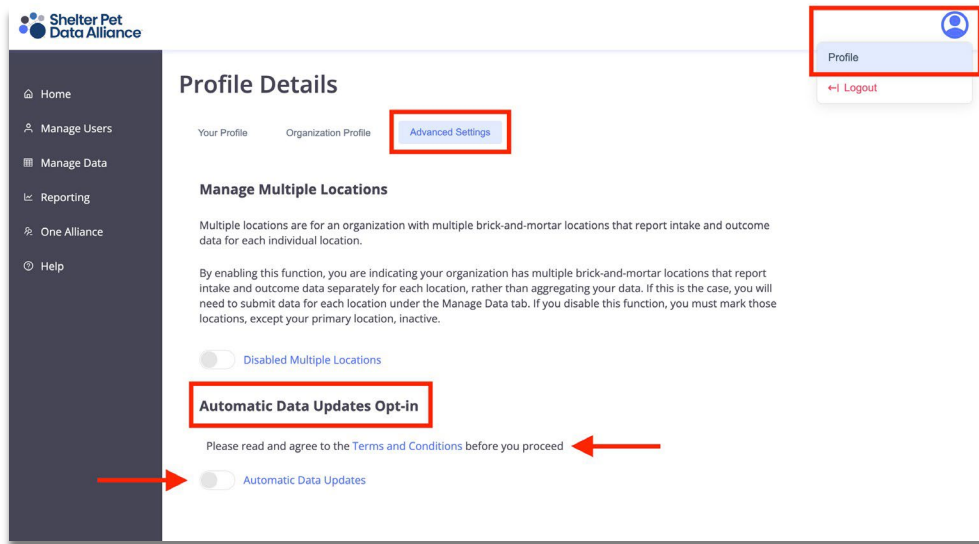
An 'Add' button is located at the bottom right of the form. Red arrows in the image point to the 'Manage Users' menu item on the left and the 'Add User' button on the right.

4. In the Add User window, complete all required fields.
5. Select Role.

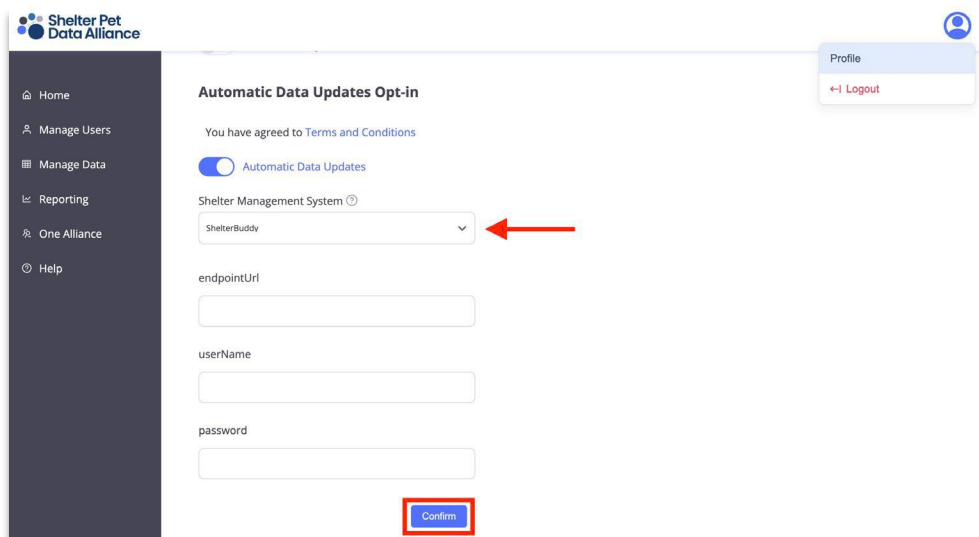
Opting-In to Automatic Data Sharing Through Your Shelter Management Software

The below instructions currently only apply to users of PetPoint.

1. Once logged into your account, click on your **Profile** in the upper right corner. Note that you must be an Admin to follow these steps.
2. Click on the **Advanced Settings** tab.
3. Under the **Automatic Data Updates Opt-in** section, click on the link for **Terms and Conditions**. Scroll to the bottom of the Terms and Conditions window and accept the terms by clicking the Agree button.



4. Next, choose your **Shelter Management System** from the dropdown menu.
5. Enter the required fields that display, then click **Confirm**.
 - *Note: If you do not know what the values are for the fields of your SMS, you will need to go into the settings of your SMS account or contact your SMS directly for support.*

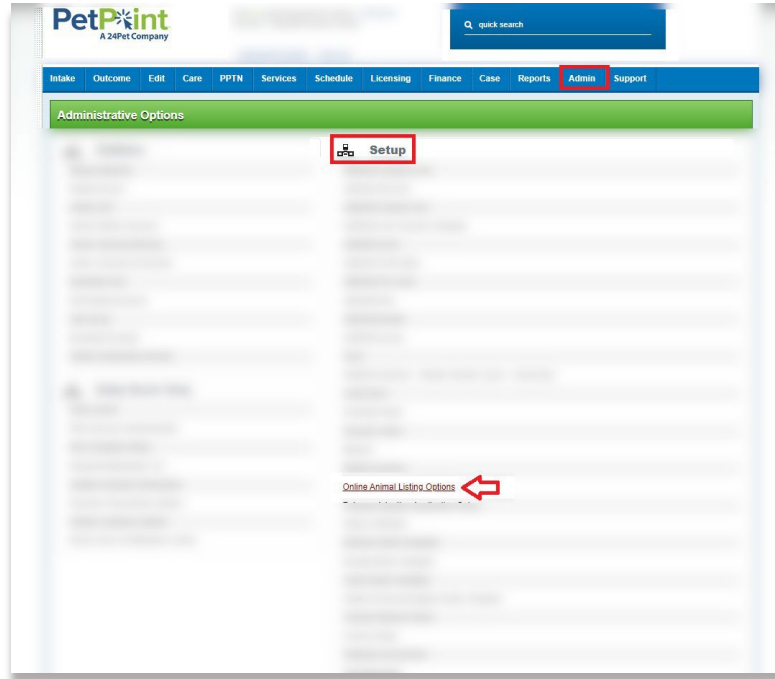


6. If your credentials were entered correctly, you will receive a success message from the system. If you receive an error message, verify the information you provided and click Confirm again.

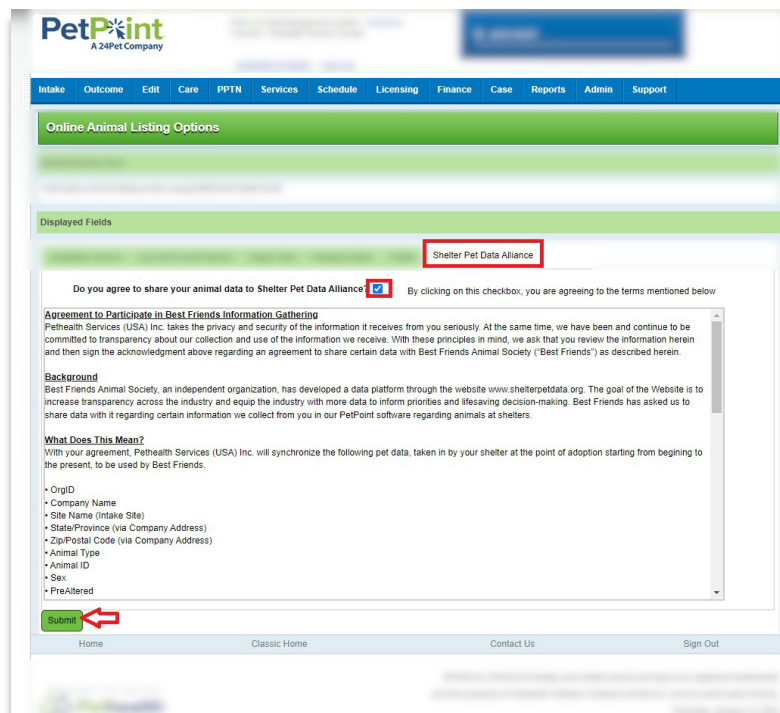
PetPoint

Please complete the following steps in **PetPoint** to finish the opt-in process for data sharing. If you have any questions or run into any issues, please [contact PetPoint support](#) directly for assistance.

1. The user can go to the **Admin** options
2. Then the user must look for the **Online Animal** listing options in the **Setup** column.



3. Then they must click on the **Shelter Pet Data Alliance** tab and agree to the terms mentioned in the tab by clicking on the checkbox and then click submit to enable the data sharing.



4. **IMPORTANT STEP** – It is important to complete the mapping updates in your PetPoint account before entering your orgID in Shelter Pet Data Alliance. To update your mappings, you can view this [video](#) or follow the below steps:

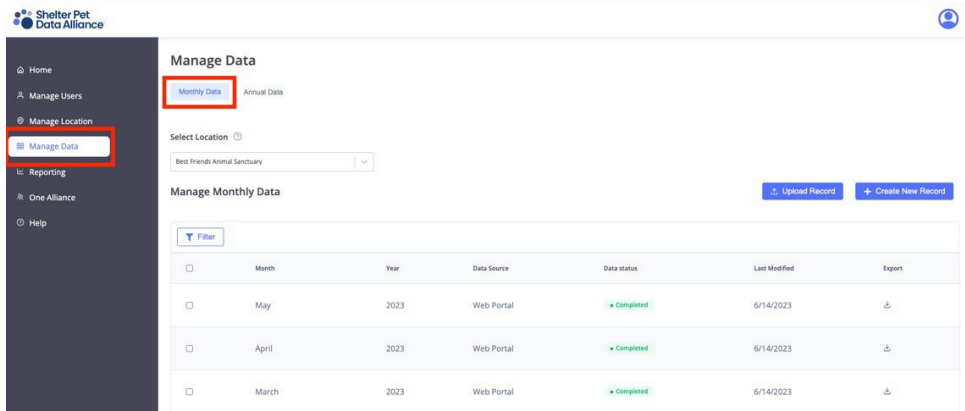
- Navigate to Admin > Admin Options.
- Select Add/Edit Asilomar – Shelter Animals Count.
- Select the Shelter Animals Count tab.
- Within the 'Operation Type' dropdown, go through each value.
- For each operation type value, ensure that all subtypes your organization utilizes are properly added to each mapping value. Mapping outdated or deleted values has no negative effect and mapping those can reduce potential reporting discrepancies.

If automatic data sharing is already turned on in your Shelter Pet Data Alliance account and you've noticed discrepancies in your data, it's likely you need to update your mappings. If this is the case, please follow the steps above, then reach out to the SPDA team via <https://shelterpetdata.org/help> and let us know you've adjusted your mappings. Due to the complexity of work behind the scenes, we'll need to take some time to validate the changes and make sure your data is up-to-date and accurate. This process will take 2-3 days before the corrected data is in your account.

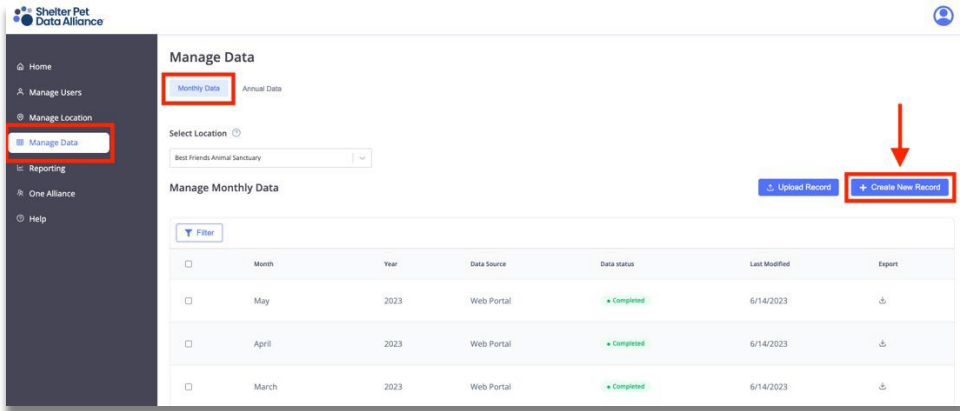
Creating New Records – Manual Reporting

Manually enter Monthly Data:

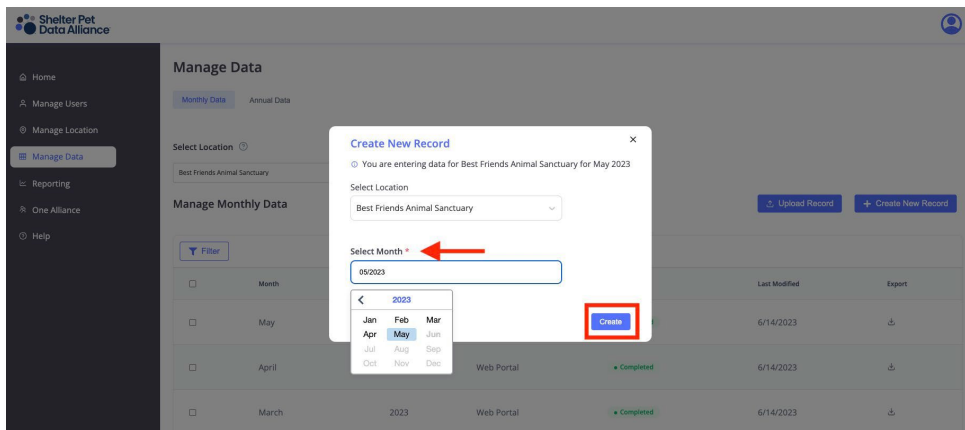
1. On the left side menu, click **Manage Data**.
2. Manage Data will open on the **Monthly Data** tab first.



3. Click the **Create New Record** button located on the right side of the screen.



4. Populate all relevant fields with data for the **month** you selected.



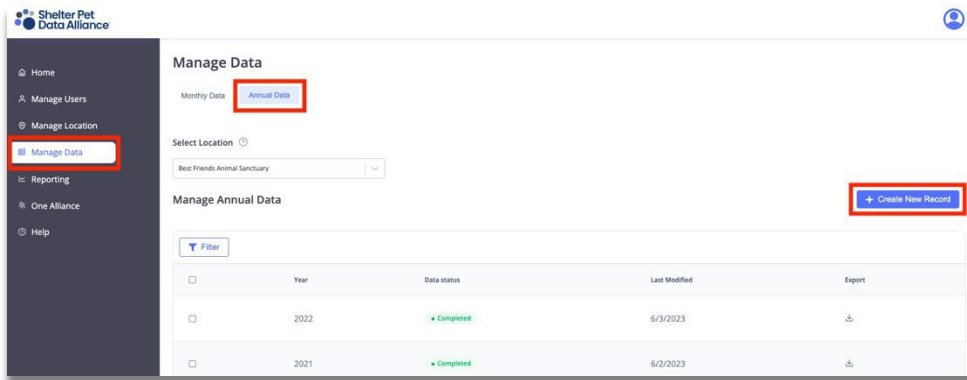
5. Click the **Submit Record** button at the bottom of the screen.

The monthly record you created will appear on the Manage Monthly Data list with a data status of pending.

- Please note, if your EIN has been verified, the data status will change to complete within four hours of submitting it. If you've created a new record before the EIN verification process is complete, the record will remain in pending status until you receive the email notification that your EIN is verified. Any data you have submitted will change to complete within four hours of receiving the EIN verification email and any future data you submit will change to complete within four hours of submitting it.

Manually enter Annual Data:

1. On the left side menu, click **Manage Data**.
2. Click the **Annual Data** tab and your list of annual records.
3. Click the **Create New Record** button located on the right side of the screen.



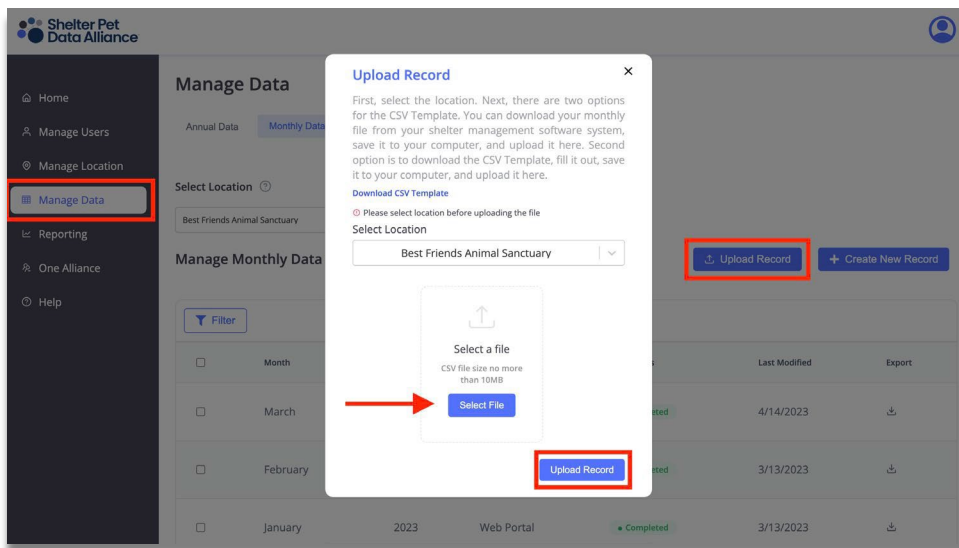
4. Populate all relevant fields with data for the **year you selected**.
5. Click the **Submit Record** button at the bottom of the screen.

The annual record you created will appear on the Manage Annual Data list with a data status of pending.

Creating New Records - Uploading CSV Files

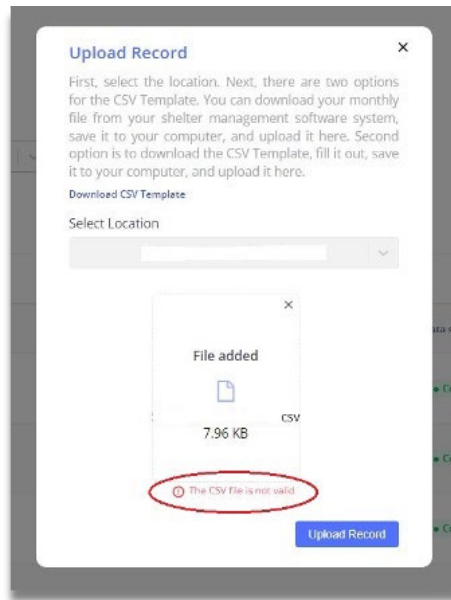
If your shelter management software has a “Shelter Animals Count” report, please follow these steps for uploading CSV files.

1. Using your “Shelter Animals Count” report, export monthly CSV files from shelter management software.
2. In Shelter Pet Data Alliance, on the left side menu, click **Manage Data**.
3. Select the **Monthly Data** tab.
4. Click the **Upload Record** button located on the right side of the screen.
5. In the Upload Record window, click **Select File**.
6. Locate the CSV file you saved to your computer during step 1.
7. Click the **Upload Record** button at the bottom of the screen.



The monthly record(s) you uploaded will appear on the Manage Monthly Data list with a data status of pending.

Trouble shooting Error Message:



Please note:

An error may be happening because some reports are aggregating data a certain way which causes 1,12 to be in the month column of the file. At this time, you can only upload one month of data at a time.

Correct file formatting:

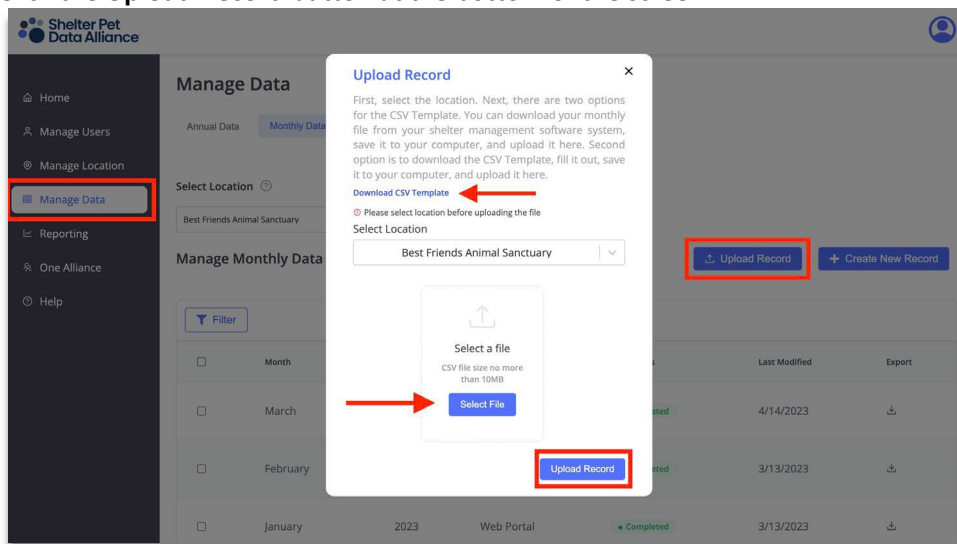
	A	B	C
1	Record Ye	Record Month	Species
2	2022		1 canine
3	2022		1 feline
4	2022		2 canine
5	2022		2 feline
6	2022		3 canine
7	2022		3 feline
8	2022		4 canine
9	2022		4 feline
10	2022		5 canine
11	2022		5 feline
12	2022		6 canine

Incorrect file formatting:

	A	B
1	Record Ye	Record Month
2	2019	1, 12
3	2019	1, 12
4	2019	1, 12
5	2019	1, 12
6	2019	1, 12
7	2019	1, 12
8	2019	1, 12

If your organization does not have shelter management software or your shelter management software does not have the option to export CSV files, please follow these steps to upload your data via CSV file.

1. On the left side menu, click **Manage Data**.
2. Select the **Monthly Data** tab.
3. Click the **Upload Record** button located on the right side of the screen.
4. Download the CSV template by clicking **Download CSV Template**
5. In the template, update the Record Year (column A) and Record Month (column B) to the year and month that corresponds with the data you are reporting. The Beginning Count Date (column BK) and the Ending Count Date (column BN) should be updated to the beginning and end dates of each month you are reporting for that year. Example: Here is what you would enter for January 2022. Column A: 2022; Column B: 1; Column BK: 1/1/2022; Column BN: 1/31/2022.
6. Populate all applicable fields.
7. Save file to your computer.
8. In the **Upload Record** window, click **Select File**.
9. Locate the CSV file you saved to your computer during **step 7**.
10. Click the **Upload Record** button at the bottom of the screen.



The monthly record(s) you uploaded will appear on the Manage Monthly Data list with a data status of pending.

Modifying Data – Manually or Uploading a CSV File

These instructions will help you modify an incorrect record. **Please note, the record must be in completed status before you can make any changes.** The process to change from pending to completed usually takes around 4 hours after the data is submitted. You can either use a compatible CSV file or do a manual correction to update the incorrect month.

CSV File Modifying

Please reference “**Creating New Records - Uploading CSV Files**”

Manual Modifying

1. Log in to your Shelter Pet Data Alliance account.
2. On the left side menu, select **Manage Data**.
3. If you need to update a *monthly* record, select the **Monthly Data** tab. If you need to update an *annual* record, select the **Annual Data** tab.

The screenshot shows the 'Manage Data' page in the Shelter Pet Data Alliance system. The left sidebar has 'Manage Data' highlighted. The main content area has 'Annual Data' selected. Below this, there is a 'Select Location' dropdown menu set to 'Best Friends Animal Sanctuary'. A '+ Create New Record' button is visible. A table titled 'Manage Annual Data' contains the following data:

<input type="checkbox"/>	Year	Data status	Last Modified	Export
<input type="checkbox"/>	2022	Completed	6/3/2023	Download
<input type="checkbox"/>	2021	Completed	6/2/2023	Download

4. Find the record on the list.
5. Click on the record to open it.
6. Click the blue **Edit** button.

The screenshot shows the 'Annual Shelter Data' page in the Shelter Pet Data Alliance system. The left sidebar has 'Manage Data' highlighted. The main content area shows details for 'Best Friends Animal Society' for the year 2022. The 'Data Status' is 'complete'. An 'Edit' button is highlighted. Below this, there is a 'Live Intake' section with a table:

Dog	Cat	Undesignated	Total
-----	-----	--------------	-------

7. Make any necessary changes.
8. When finished with edits, click **Submit Record**.
9. To **EXIT** the screen *without* making changes, select the **Back** button in your browser or click **Manage Data** on the left side menu. A pop-up will appear stating “You will lose all unsaved work. Are you sure you want to leave this page?”. Click **OK** to leave without saved changes or click **Cancel** to stay on the page.

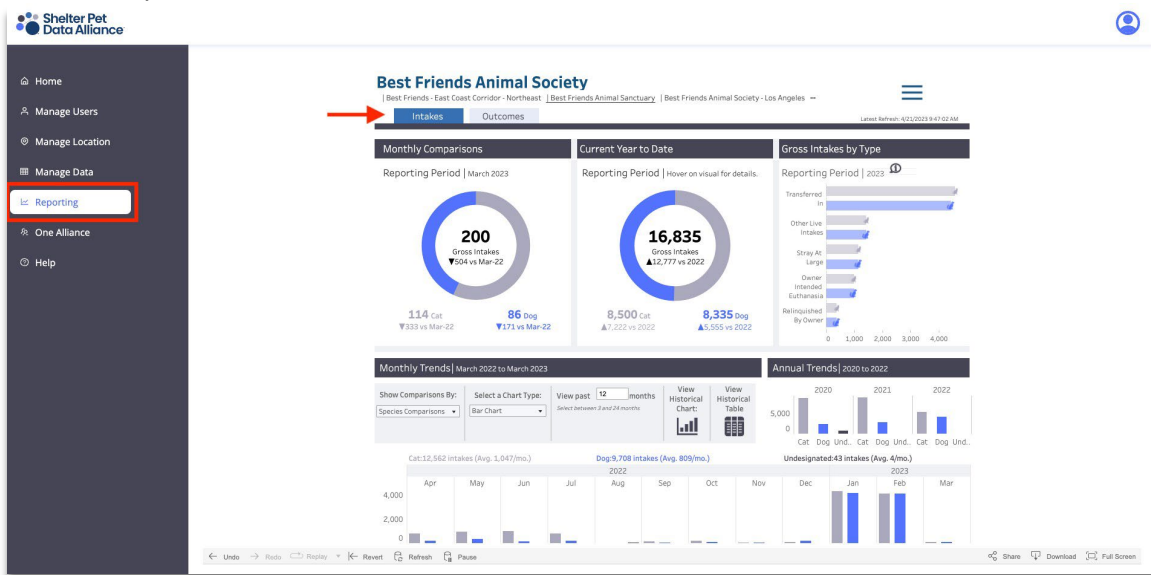
The updated record will appear on the list with a data status of pending. It will change to complete within four hours of submitting it.

Reporting

You may experience a slight delay when clicking between the Incomes and Outcomes on the Reporting tab. Currently, the system doesn't tell you it's working and for a few seconds, it may look like it's not responding. We are working on this and hope to improve it soon.

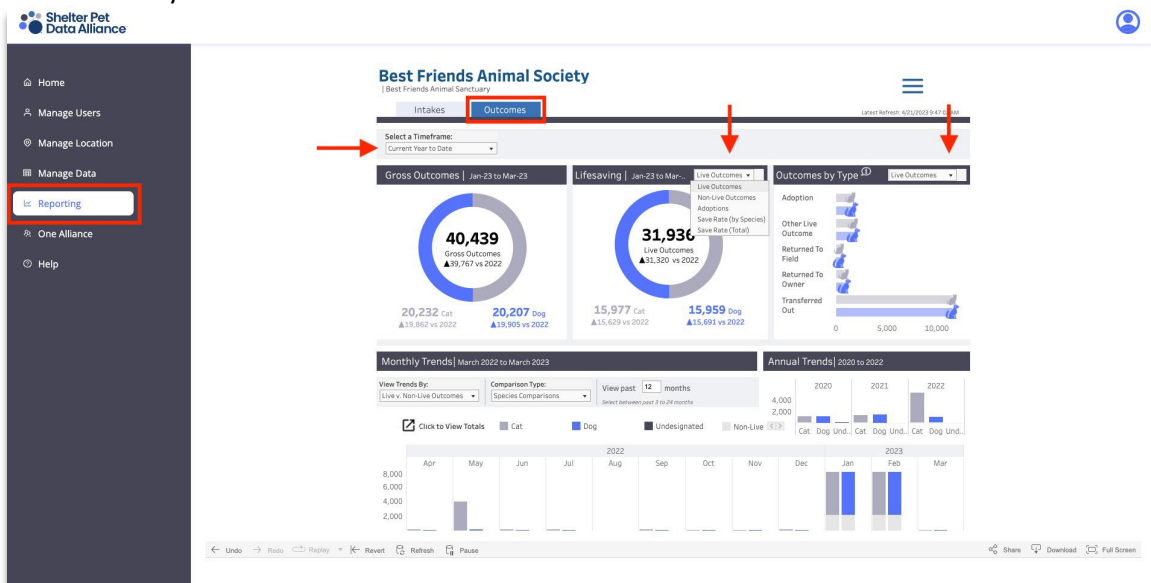
Intakes

1. On the left side menu, click **Reporting**
2. You will default to the **Intakes** tab first.
3. On this tab, you will be able to view Monthly Comparisons, Current Year to Date, Gross Intakes, Monthly Trends, and Annual Trends.



Outcomes

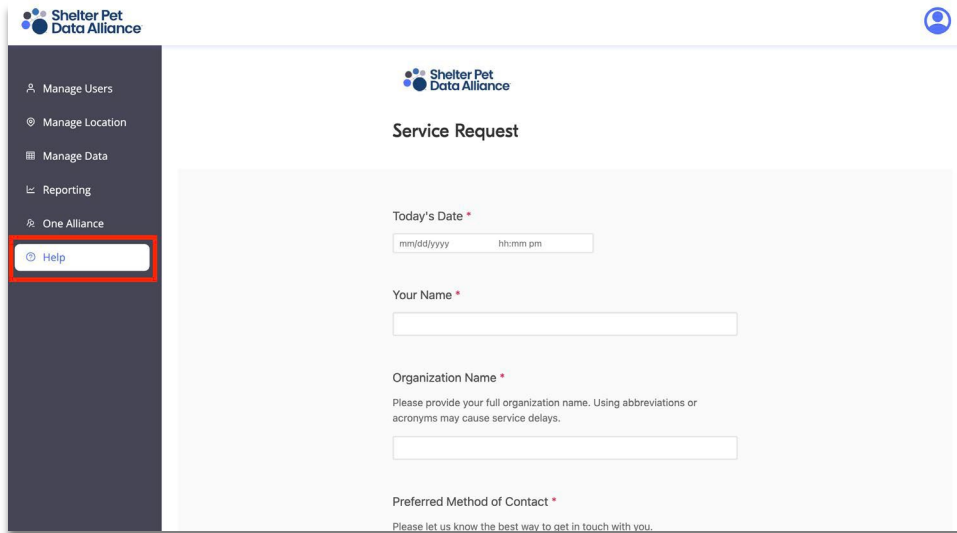
1. On the left side menu, click **Reporting**.
2. You will default to the **Intakes** tab first, click on **Outcomes** tab.
3. You can **Select a Timeframe** from the drop-down menu.
4. The middle box, Lifesaving section, you can choose from the **drop-down menu**, the type of Lifesaving data you wish to view.
5. The right end box, Outcomes by Type, you can choose from the drop-down menu, the type of outcome you wish to view.



Help

If Logged in with Shelter Pet Data Alliance:

1. If you have further questions or need assistance, on the left side menu, click **Help**
2. Fill out a **Service Request**, populate all applicable fields.
3. Click **Submit**.



Shelter Pet Data Alliance

Manage Users
Manage Location
Manage Data
Reporting
One Alliance
Help

Shelter Pet Data Alliance

Service Request

Today's Date *

mm/dd/yyyy h:mm pm

Your Name *

Organization Name *

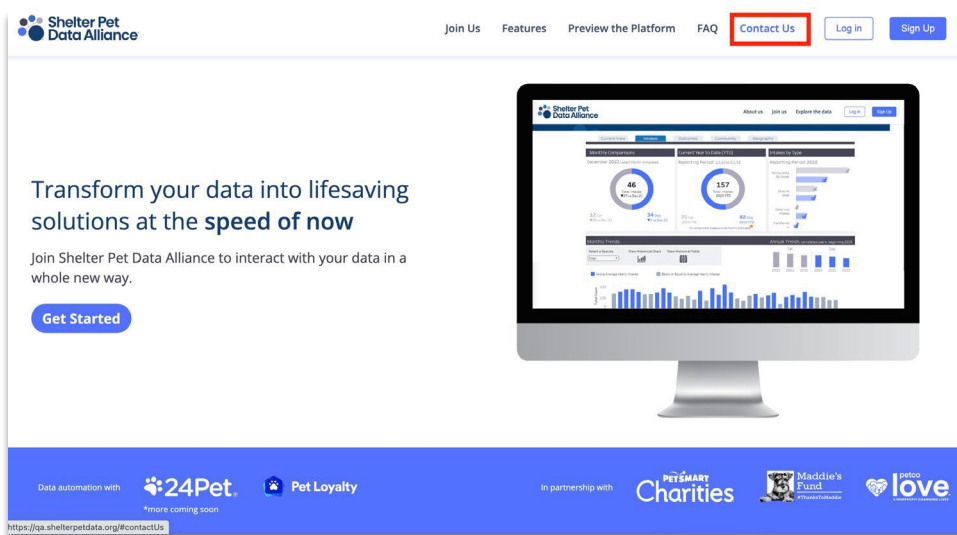
Please provide your full organization name. Using abbreviations or acronyms may cause service delays.

Preferred Method of Contact *

Please let us know the best way to get in touch with you.

On the home page, not logged in:

1. Click **Contact Us**, at the top right of the main page
2. Fill out the **Contact Us** form, populate all applicable fields.
3. Click **Submit**



Shelter Pet Data Alliance

Join Us Features Preview the Platform FAQ **Contact Us** Log In Sign Up

Transform your data into lifesaving solutions at the speed of now

Join Shelter Pet Data Alliance to interact with your data in a whole new way.

Get Started

Data automation with 24Pet Pet Loyalty

In partnership with PetSmart Charities Maddie's Fund petco love

<https://qa.shelterpetdata.org/#contactUs>