

Animals in ShelterPact

Detailed instructions with real ShelterPact screenshots

Interface reviewed October 12, 2026. Screenshots show fictional demo records. Available features and actions depend on organization modules, permissions, and record state.

Find, create, update, house, and review permanent animal records while preserving identity and operational history.

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Find an Existing Animal and Avoid Duplicate Records

Search before creating a record or intake. One permanent identity can connect multiple custody episodes, medical entries, identifiers, relationships, and outcomes.

Before you begin: Open Records / Animals. Have any microchip, license, tag, name, species, breed, and known history available.

Step-by-step instructions

1. Enter the most reliable identifier in the animal search field. If no match appears, search again using the name or physical descriptors.
2. Clear a restrictive status filter and use Advanced Filters when needed. Include historical outcomes in your identity check.
3. Compare species, primary and secondary breed, color, sex, approximate age, markings, and identifiers. Open each plausible candidate rather than choosing from a name alone.
4. Review the record's Custody and Outcomes sections to understand previous episodes. Check People and Cases & Calls for relevant links.
5. Reuse the correct record when the animal returns. Begin Intake for a new admission event when appropriate.
6. Create a new record only when the identity check does not reveal the same animal. Pay attention to duplicate warnings when identifiers are entered.

Screenshots

Figure 1. The animal directory provides search, status filters, and identifiers.



OPERATIONS

SHELTER

RECORDS

Animals

People

Partner Organizations

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Forms & Documents

COMPLIANCE

WORK MANAGEMENT

ADMINISTRATION

Search ShelterPact...

+ New



ShelterPact Demo User

Northstar Valley Animal Services

Demo User

SD

Animal Records

Animals

Search permanent animal records by identity, descriptors, custody, location, or history.

Search ID, name, chip, license, rabies tag, breed or color...

All statuses

Advanced Filters

19 records

Animal	Species / Breed	Sex / Age	Identifiers	Current State	Updated
 Harbor A26-000001	Dog Mixed Breed	Male Unknown · Unknown	 None recorded	 PENDING EVALUATION In agency custody	10/12/2026 View
 Hazel DEMO-A-0016	Rabbit Mixed Breed	Female ~2 years · Altered	 985141000000016 Microchip	 AVAILABLE Small Animal / S-A01	9/27/2026 View
 Mochi DEMO-A-0011	Cat Domestic Shorthair	Female ~1 year · Altered	 R26-1011 Rabies tag	 AVAILABLE Cat Ward A / C-A02	9/27/2026 View
 Oliver DEMO-A-0010	Cat Domestic Shorthair	Male ~2 years · Altered	 985141000000010 Microchip	 AVAILABLE Cat Ward A / C-A01	9/27/2026 View
 Luna DEMO-A-0006	Dog Chihuahua	Female ~7 years · Intact	 985141000000006 Microchip	 AVAILABLE Dog Ward A / D-A06	9/27/2026 View
 Juniper DEMO-A-0004	Dog Golden Retriever	Female ~2 years · Altered	 985141000000004 Microchip	 AVAILABLE Dog Ward A / D-A04	9/27/2026 View
 Scout DEMO-A-0002	Dog Beagle	Female ~3 years · Altered	 985141000000002 Microchip	 AVAILABLE Dog Ward A / D-A02	9/27/2026 View
 Maple	Dog	Male	 R26-1001	 AVAILABLE	

Practical checks

Unknown or unnamed animals still need consistent descriptors and a scan for identifiers.

Troubleshooting

What you see	What to check
Only animals in custody are shown	You may be in Current Population rather than the permanent Animals directory.
A duplicate warning appears	Recheck the identifier and candidate record before continuing.

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Create a Permanent Animal Record

New Animal Record creates the identity that other ShelterPact workflows reuse. Use Intake instead when your primary event is an animal entering custody.

Before you begin: Complete an identity search first. Gather observed descriptors and any identifiers; do not invent unknown information.

Step-by-step instructions

1. Open Records / Animals / New Animal, or New / Add Animal. Enter Animal Name if known; unnamed animals can be recorded as Unknown.
2. Select Species, Primary Breed, and optional Secondary Breed. Record Sex and Altered Status as known, using Unknown where they have not been verified.
3. Choose Record Status intentionally. Review the default rather than accepting Available for an animal that has not yet been evaluated.
4. Enter Date of Birth and mark it estimated when appropriate. Record Weight in pounds, colors, and distinguishing markings.
5. Use Choose Photo for a clear identification image. The displayed limits allow JPEG, PNG, or WebP up to 5 MB.
6. Enter Microchip Number, License Number, and Rabies Tag accurately. Review any possible duplicate records flagged by identifiers.
7. Keep staff-only notes in Internal Notes. Enter adopter-facing information only in Public Adoption Profile when appropriate.
8. Select Create Animal Record. Reopen or review the saved record, verify the assigned animal number and descriptors, then begin any required custody or care workflow.

Fields and meanings

Field / control	What to review
Species	Required identity classification.
Estimated birth date	Identify an estimate rather than presenting it as exact.
Weight	The form records pounds; the public size category is selected separately.
Photo	JPEG, PNG, or WebP; up to 5 MB in the inspected form.
Identifiers	Enter numbers exactly; they are checked for possible duplicates.

Screenshots

Figure 1. The animal form separates identity, description, public profile, identifiers, and internal notes. (part 1 of 4)



ShelterPact

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Animal Records

New Animal Record

Create a permanent municipal animal record.

Identity

Permanent ShelterPact identification and record status.

Animal Name

Unknown if unnamed

Species *

Dog

Primary Breed

Select or type a breed

Secondary Breed

Optional

Sex

Unknown

Altered Status

Unknown

Record Status

Available

Animal Photo

Upload a photo for fast visual identification. JPEG, PNG, or WebP up to 5 MB.

Choose Photo

No photo selected.

ShelterPact Demo

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Figure 1. The animal form separates identity, description, public profile, identifiers, and internal notes. (part 2 of 4)

Description

Physical descriptors used for field identification and matching.

Date of Birth

mm/dd/yyyy

Weight (lb)

Optional

☐ Date of birth is estimated

Use this when the animal's exact birth date is not known.

Primary Color

Select or type a color

Secondary Color

Optional

Markings / Description

Distinctive markings, scars, coat pattern, ear crop, tail, collar, or other identifying characteristics...

Public Adoption Profile

Adopter-facing information used by External Publishing connectors. Internal notes and physical markings remain separate.

Public Size

Not set

Choose the category staff want displayed publicly; ShelterPact does not guess size from weight.

Public Coat Length

Not set

Used by external adoption listings; choose a known value instead of inferring it from breed.

Public Adoption Biography

Friendly adopter-facing biography, personality, routines, favorite activities, and other appropriate public details...

Figure 1. The animal form separates identity, description, public profile, identifiers, and internal notes. (part 3 of 4)

Plain text only. Do not include staff-only, enforcement, medical, or personal information.

House Trained

Unknown / not assessed

Good With Children

Unknown / not assessed

Good With Cats

Unknown / not assessed

Special Needs

Unknown / not assessed

Good With Dogs

Unknown / not assessed

Identifiers

Identifiers are checked automatically for possible duplicate records.

Microchip Number

Scan or enter chip number

License Number

Agency license number

Rabies Tag

Rabies tag number

Internal Notes

Staff-only record notes. Enforcement and medical workflows remain separate modules.

General animal record notes...

Cancel

Create Animal Record

Figure 1. The animal form separates identity, description, public profile, identifiers, and internal notes. (part 4 of 4)

Practical checks

An identity record can exist without active custody. Confirm the animal is admitted through Intake when that is the event.

Troubleshooting

What you see	What to check
The animal is saved but not in Current Population	Review whether an intake/custody episode was created.
An unknown breed or sex is later confirmed	Update the existing record rather than creating a replacement identity.

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Update Animal Details and the Public Adoption Profile

Edit Record updates identity and descriptive information. The public adoption profile is distinct from internal notes and clinical or enforcement history.

Before you begin: Open the correct animal and confirm its number. Use information verified by staff and appropriate for public display.

Step-by-step instructions

1. Select Edit Record. Correct only the fields that need updating and review identifiers carefully.
2. Update physical descriptors, birth date estimation, weight, and photo as supported by the form. Use clinical or enforcement workspaces for their formal records.
3. In Public Adoption Profile, select Public Size and Public Coat Length directly. The interface does not guess these from weight or breed.
4. Write a plain-text Public Adoption Biography describing personality and appropriate adopter-facing information. Keep staff-only, personal, enforcement, and confidential medical information out of the biography.
5. Set House Trained, Special Needs, and compatibility with children, dogs, or cats only when assessed. Unknown / not assessed is a valid choice.
6. Save using the form's displayed action. Return to Overview and confirm the updated information before preparing an external publishing preview.
7. Review publishing eligibility separately. A completed public biography does not mean the animal has been sent to an adoption network.

Screenshots

Figure 1. Public profile fields are separate from internal and identification information. (part 1 of 4)



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Animal Records

New Animal Record

Create a permanent municipal animal record.

Identity

Permanent ShelterPact identification and record status.

Animal Name

Unknown if unnamed

Species *

Dog

Primary Breed

Select or type a breed

Secondary Breed

Optional

Sex

Unknown

Altered Status

Unknown

Record Status

Available

Animal Photo

Upload a photo for fast visual identification. JPEG, PNG, or WebP up to 5 MB.

Choose Photo

No photo selected.

ShelterPact Demo

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Figure 1. Public profile fields are separate from internal and identification information. (part 2 of 4)

Description

Physical descriptors used for field identification and matching.

Date of Birth

mm/dd/yyyy

Weight (lb)

Optional

☐ Date of birth is estimated

Use this when the animal's exact birth date is not known.

Primary Color

Select or type a color

Secondary Color

Optional

Markings / Description

Distinctive markings, scars, coat pattern, ear crop, tail, collar, or other identifying characteristics...

Public Adoption Profile

Adopter-facing information used by External Publishing connectors. Internal notes and physical markings remain separate.

Public Size

Not set

Public Coat Length

Not set

Choose the category staff want displayed publicly; ShelterPact does not guess size from weight.

Used by external adoption listings; choose a known value instead of inferring it from breed.

Public Adoption Biography

Friendly adopter-facing biography, personality, routines, favorite activities, and other appropriate public details...

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Figure 1. Public profile fields are separate from internal and identification information. (part 3 of 4)

Plain text only. Do not include staff-only, enforcement, medical, or personal information.

House Trained	Special Needs
Unknown / not assessed	Unknown / not assessed

Good With Children	Good With Dogs
Unknown / not assessed	Unknown / not assessed

Good With Cats

Unknown / not assessed

Identifiers

Identifiers are checked automatically for possible duplicate records.

Microchip Number	License Number
Scan or enter chip number	Agency license number

Rabies Tag

Rabies tag number

Internal Notes

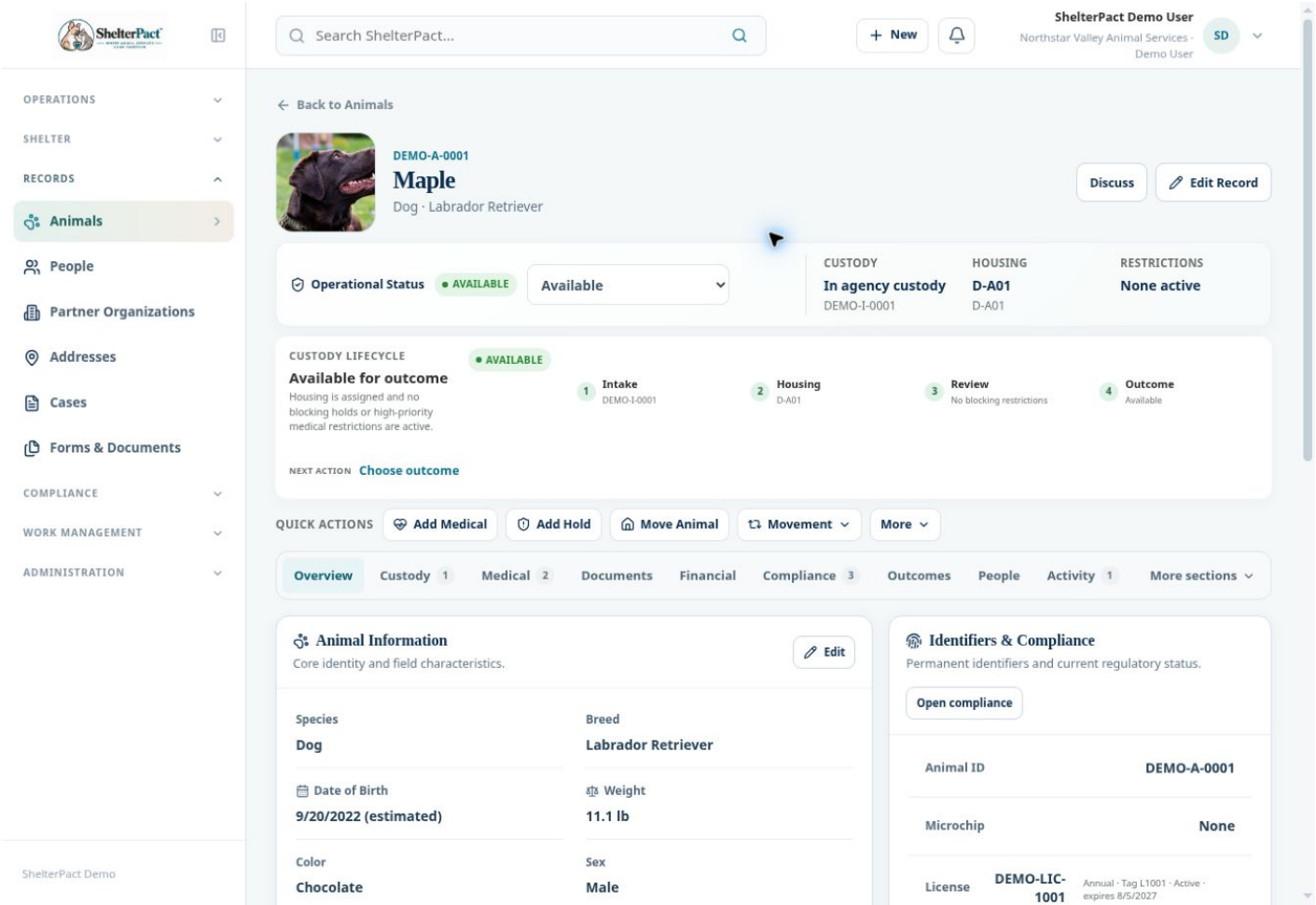
Staff-only record notes. Enforcement and medical workflows remain separate modules.

General animal record notes...

Cancel Create Animal Record

Figure 1. Public profile fields are separate from internal and identification information. (part 4 of 4)

Figure 2. Overview shows the identity and public-profile entry point.



Practical checks

A public special-needs indicator is not the animal's full clinical record. Use approved public wording while preserving clinical detail in Medical.

Troubleshooting

What you see	What to check
Publishing still excludes the animal	Check photo, breed, sex, active custody, hold restrictions, and provider mappings.
The record status changed but custody did not	Use the appropriate intake or outcome workflow for a custody event.

Read Animal Record Sections and Follow Related Work

An animal record collects its connected operational history. Use the header for the present state and the section tabs for the underlying events.

Before you begin: Open Records / Animals and select the animal. Confirm its number before adding or reviewing information.

Step-by-step instructions

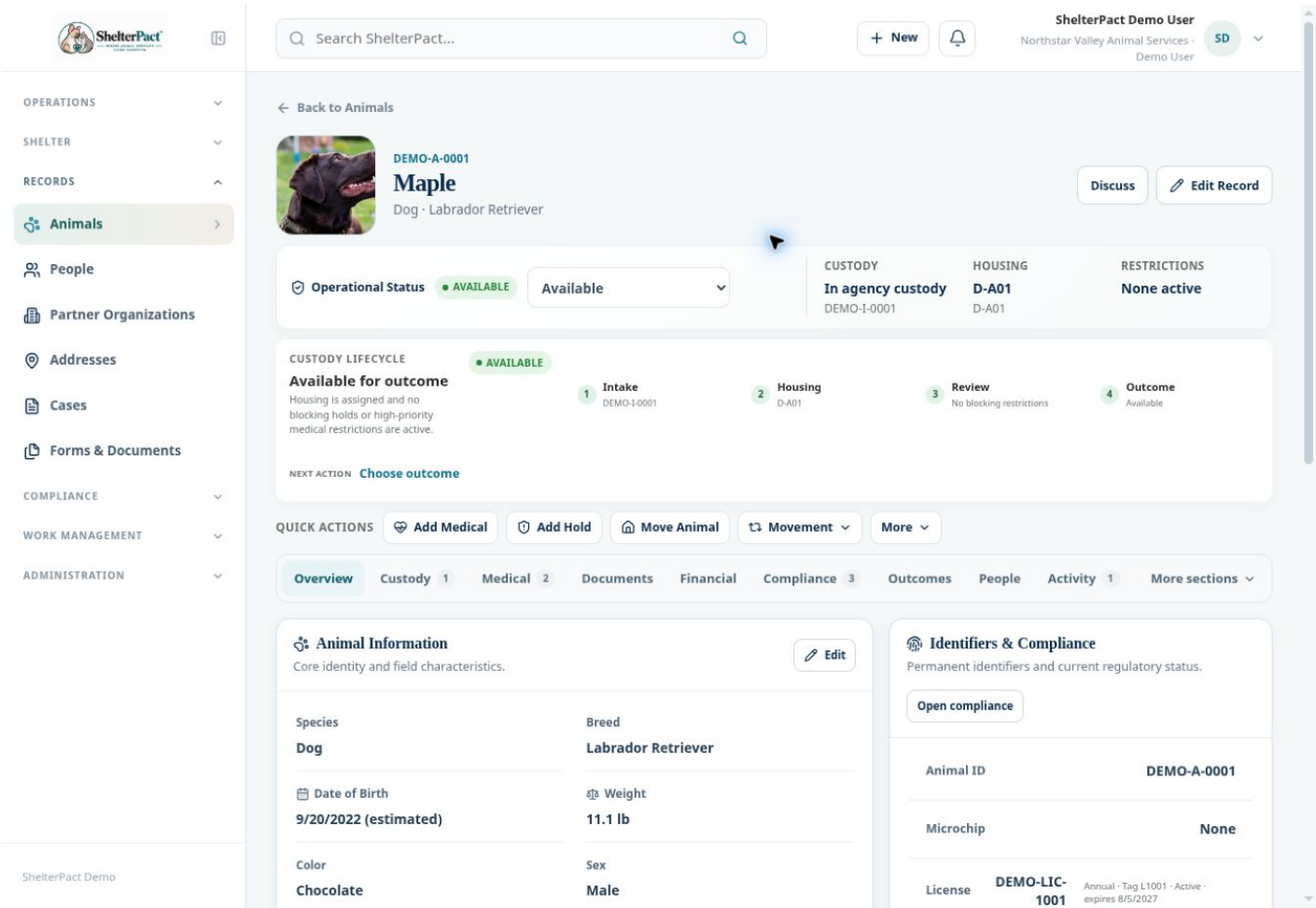
1. Review Operational Status, Custody, Housing, and Restrictions. Read the custody lifecycle panel and its suggested next action.
2. Open Custody for intake episodes, Medical for clinical history, and Documents for associated forms and agreements.
3. Open Financial for charges and payments, Compliance for licenses, rabies, and citations, and Outcomes for recorded dispositions.
4. Use People for current and historical relationships and Activity for recorded events.
5. Open More sections for Holds, Housing, Cases & Calls, Tasks & Diary, and Media. Counts indicate related items rather than an approval state.
6. Use Add Medical, Add Hold, Move Animal, or Movement to begin the relevant workflow. Verify you are acting on this animal before saving.
7. Follow the linked intake, person, call, or case to review its own record. Each connected record retains details that may not appear in the animal summary.

Fields and meanings

Field / control	What to review
Custody	Admission episodes and their state.
Medical and Documents	Care history and paperwork.
Financial and Compliance	Charges, payments, licenses, rabies, and citations.
Outcomes and People	Dispositions and relationships.
More sections	Restrictions, housing, linked field work, staff work, and media.

Screenshots

Figure 1. The animal header and record tabs connect identity with current operations.



Troubleshooting

What you see	What to check
A tab is not on the main row	Open More sections.
The summary seems incomplete	Open the linked source record and review its history and current status.

Assign Housing and Move an Animal

Housing identifies the animal's physical location while it is in custody. ShelterPact checks destination capacity and records movements in the animal's history.

Before you begin: Confirm active custody, current restrictions, the destination's suitability, and available capacity. Do not use an outcome to represent a kennel change.

Step-by-step instructions

1. Open the animal and select Move Animal, or locate it through Current Population or Kennel Board.
2. Review Current Housing and Occupancy. Check Movement History to confirm the current assignment.
3. Select Move to and choose an appropriate housing location. Full destinations are disabled in the inspected animal movement screen.
4. Enter Movement reason when a operational explanation will help other staff. Check that the selected destination matches the actual planned move.
5. Select the enabled Move Animal action. Review the new current location and the recorded movement before relying on the change.
6. On Kennel Board, authorized staff can use drag-and-drop or Move on touch devices. The same movement checks apply.
7. Use Remove from Housing only for an appropriate removal of a physical assignment. Removing housing does not itself close custody; use the correct outcome when custody ends.

Screenshots

Figure 1. Current Housing displays occupancy, destination availability, and movement history. (part 1 of 2)

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ADMIN

Search ShelterPact...

+ New

SD

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DEMO-A-0001

Maple

Dog · Labrador Retriever

Discuss

Edit Record

Operational Status

AVAILABLE

Available

CUSTODY

In agency custody

DEMO-I-0001

HOUSING

D-A01

D-A01

RESTRICTIONS

None active

CUSTODY LIFECYCLE

AVAILABLE

Available for outcome

Housing is assigned and no blocking holds or high-priority medical restrictions are active.

1 Intake

DEMO-I-0001

2 Housing

D-A01

3 Review

No blocking restrictions

4 Outcome

Available

NEXT ACTION Choose outcome

QUICK ACTIONS

Add Medical

Add Hold

Move Animal

Movement

More

Overview

Custody 1

Medical 2

Documents

Financial

Compliance 3

Outcomes

People

Activity 1

More sections

Current Housing

Physical shelter location and complete movement history.

1 MOVEMENTS

Current location



Dog Ward A / D-A01

D-A01

Occupancy

1/1

Move to

Select housing location...

Movement reason

Optional reason or operational note

Move Animal

Remove from Housing

Figure 1. Current Housing displays occupancy, destination availability, and movement history. (part 2 of 2)

← BACK TO ANIMAL

REMOVE FROM HOUSING

Movement History

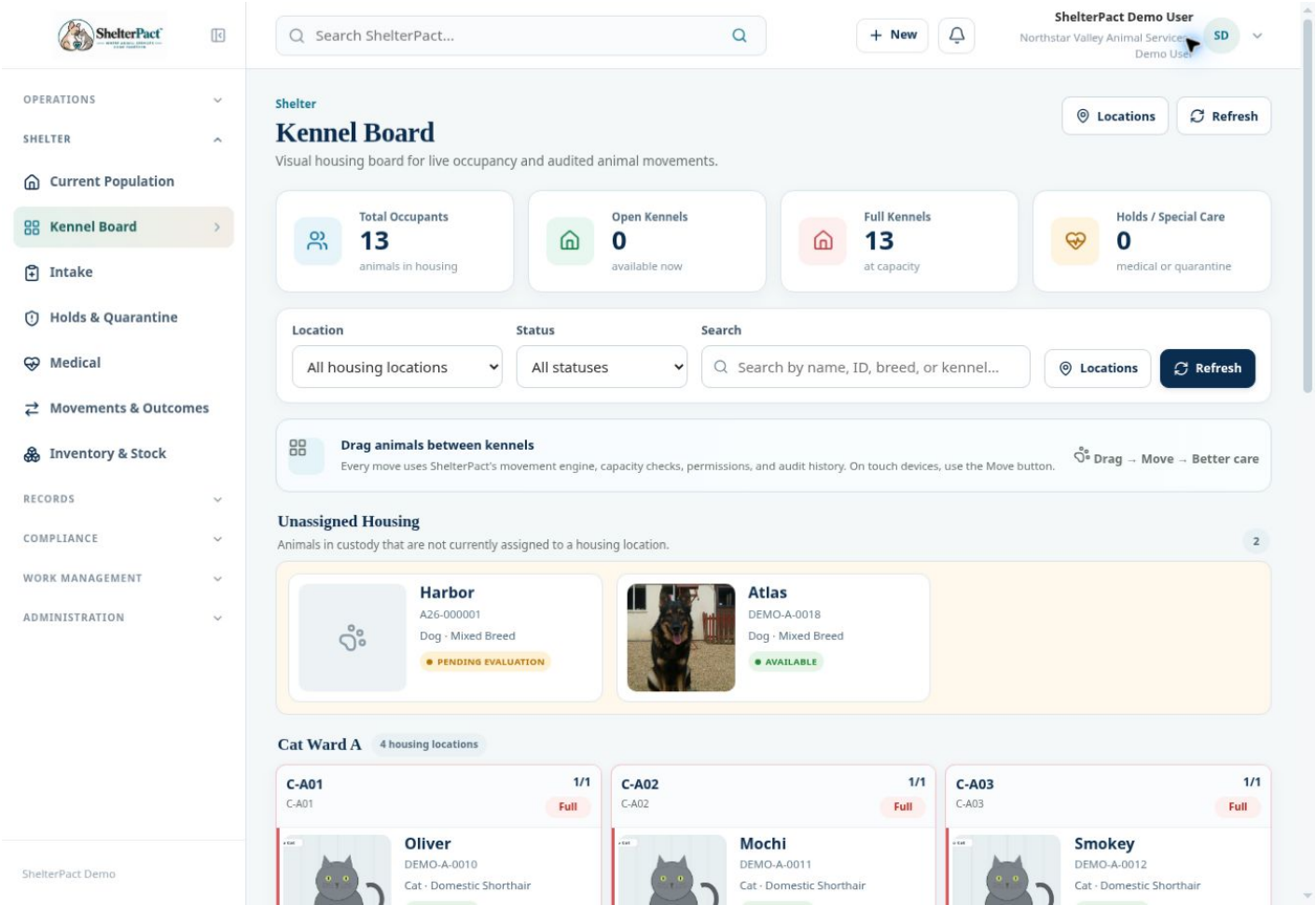
Unassigned → Dog Ward A / D-A01

Intake · Initial housing assignment

9/2/2026, 10:24:15 AM

ShelterPact Administrator · DEMO-I-0001

Figure 2. Kennel Board provides a visual housing view.



Practical checks

A kennel that is disabled as FULL needs a legitimate capacity or occupancy resolution. Do not select an unrelated location simply to bypass the warning.

Troubleshooting

What you see	What to check
Every destination is full	Review legitimate available housing with a supervisor or location administrator.
The animal remains in custody after housing removal	That is a separate state; complete an appropriate custody-closing workflow only when the animal leaves agency custody.

Create and Review Holds or Quarantine

Holds restrict release, movement, or other actions according to organization rules. Their dates, authority, reason, and release requirements must accurately describe the individual restriction.

Before you begin: Open Shelter / Holds & Quarantine or Add Hold on the animal. Have the responsible authority, reason, review timing, and related case or call available.

Step-by-step instructions

1. Select New Hold and confirm the Animal. Choose the Hold Type matching the actual restriction.
2. Review the default holding period and whether it is a Blocking release restriction. Organization rules control the behavior; do not assume every type has the same duration.
3. Enter or review Review Date/Time and Expiration Date/Time. Confirm the timing against the authorized direction and agency policy.
4. Record Issuing Authority, Assigned Staff, Source Incident, Related Case, Reason, and Notes as applicable or required.
5. Select Create Hold. Review the new restriction in the Hold Register and on the animal record.
6. Filter Active, Released, Overdue, or Due Soon to manage follow-up. Open the affected animal and associated case before deciding whether the restriction can be released.
7. An authorized staff member must use the available release workflow and document the reason. Confirm the restriction's state afterward; a date passing is not by itself release authorization.

Screenshots

Figure 1. The restriction form captures timing, authority, staff assignment, links, and reason. (part 1 of 2)

The screenshot shows the 'New Restriction' form in the ShelterPact application. The form is titled 'Create Hold / Quarantine' and includes a sub-header 'Blocking holds will prevent custody closure until released.' The form fields are as follows:

- Animal:** A dropdown menu with the text 'Select animal...'.
- Hold Type:** A dropdown menu with the text 'Stray Hold'.
- Blocking release restriction:** A checkbox that is checked, with a note 'Set by your organization's Hold Types & Rules configuration.'
- Review Date/Time:** A date and time picker showing 'mm/dd/yyyy, --:-- --'.
- Expiration Date/Time:** A date and time picker showing '10/15/2026, 04:03 PM'.
- Issuing Authority:** A dropdown menu with the text 'Officer, court, veterinarian...'.
- Assigned Staff:** A dropdown menu with the text 'Unassigned'.
- Source Incident:** A dropdown menu with the text 'No linked call'.
- Related Case:** A dropdown menu with the text 'No linked case'.
- Reason *:** A text input field with the placeholder text 'Why this hold or quarantine is required'.
- Notes:** A large text area for additional information.

The background shows the ShelterPact interface with a sidebar menu on the left containing sections like OPERATIONS, SHELTER, RECORDS, COMPLIANCE, WORK MANAGEMENT, and ADMINISTRATION. The main content area displays 'Holds & Quarantine' with a list of active holds and a 'New Hold' button.

Figure 1. The restriction form captures timing, authority, staff assignment, links, and reason. (part 2 of 2)

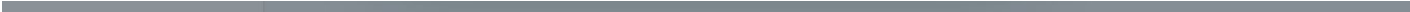


Figure 2. The register identifies blocking holds and overdue reviews. (part 1 of 2)



OPERATIONS

SHELTER

Current Population

Kennel Board

Intake

Holds & Quarantine

Medical

Movements & Outcomes

Inventory & Stock

RECORDS

COMPLIANCE

WORK MANAGEMENT

ADMINISTRATION

Search ShelterPact...

+ New

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Shelter / Legal

Holds & Quarantine

Manage release restrictions, quarantine periods, legal holds, and review deadlines.

Active holds
2

Blocking
2

Quarantine
1

Overdue / Due soon
2 / 0

Hold Register

Active and historical restrictions for animals in your organization.

2 SHOWN

Search animal, type, authority, reason...

Active

All timing

Animal	Hold	Timing	Authority / Reason	Assigned
DEMO-A-0003 - Ranger DEMO-I-0003	Quarantine Blocking - Active	OVERDUE 9/20/2026, 9:54:15 AM	Not specified Bite quarantine pending review.	ShelterPact Administrator
DEMO-A-0005 - Copper DEMO-I-0005	Medical Blocking - Active	OVERDUE 9/20/2026, 9:54:15 AM	Not specified Medical hold pending recheck.	ShelterPact Administrator

ShelterPact Demo

Figure 2. The register identifies blocking holds and overdue reviews. (part 2 of 2)

Practical checks

Blocking restrictions can prevent final custody closure even when other outcome steps are complete.

Troubleshooting

What you see	What to check
An outcome remains blocked	Confirm whether the hold was actually released and whether other restrictions remain.
A type's default period is inappropriate	Have an authorized administrator review Hold Types & Rules; do not treat demonstration defaults as local requirements.