



# Animal Rescue Record-Keeping Toolkit

## ANIMAL RESCUE ENTITY SAMPLE RECORDS AND FORMS

### Record-Keeping/Documentation Recommendations

Oregon Revised Statutes (ORS) 609.415 and Oregon Administrative Rules (OAR) 603-015-0090 specify certain records that Animal Rescue Entities (AREs) in Oregon must keep for every animal that enters the ARE's custody. Those specific record requirements are summarized later in this document. The purpose of this document and the record templates and examples included in it, is not to mandate that one specific method of record-keeping must be followed, but rather to provide an example of one option that could be used by AREs to ensure that the records kept meet all applicable requirements. Animal Rescue Entities are encouraged to find a method of keeping animal records that works for them, but if the templates included in this toolkit are helpful, they are free to be used or modified in any way.

It should be noted, however, that simply utilizing the record templates in this toolkit does not guarantee successful compliance with the recordkeeping requirements. These templates are simply intended to provide a template that includes space to record every required piece of an animal's record. It remains the responsibility of the ARE to ensure that the necessary information is being recorded.

#### PAPER VS. DIGITAL RECORDS

There are many very good record systems available on the marketplace for AREs to utilize to maintain their records. Entities are strongly recommended to utilize the system that works best for them, but if an electronic record system is utilized, it is up to the ARE to ensure that the system is configured properly to capture all of the required information.

For new AREs, or those looking to simplify their record-keeping process, the templates included in this toolkit are intended to be used in a simple paper-based system. Depending on the needs and resources of an ARE, they could just as easily be converted into fillable digital forms for storage electronically, or used in a hybrid approach where the completed paper documents are scanned and saved electronically.

A hybrid system with paper forms combined with a digital list (shared online spreadsheet, etc) often provides the best of both worlds, giving easy access to information, while also simplifying the process of capturing information and providing a safety net in the event that issues arise with digital records.

If shared spreadsheets are utilized, ensure that access is closely controlled, and that each person with access understands how to use the spreadsheet. Volunteers who do not have adequate experience may inadvertently cause data to be lost.

#### BASIC PAPER RECORDS SYSTEM

A simple records system can be created with very little expense from readily available office supplies. A plastic file box can be outfitted with hanging folders and file folders. A file folder can be used for each animal, while hanging folders can be utilized to group animals by location within a physical shelter or by foster family.

# Form Descriptions & Instructions

## ANIMAL SPREADSHEET

The animal spreadsheet is not intended to be a repository of any required records, but rather a quick-reference index of animals in the ARE's custody. The spreadsheet included with the toolkit includes four tabs, with columns for all of the information that ODA typically requests at the beginning of a records inspection.

The first tab (Current Animal List) is intended to record animals that are currently in the ARE's custody. Animals should be added to this tab when they first enter the ARE's custody. The second tab (Disposition Animal List) is intended to track animals that have left the ARE's custody. When an animal leaves the ARE's custody, it should be moved from the Current Animal List to the Disposition Animal List.

The third tab (Location & Foster List) includes columns for all of the information required to be recorded for an animal's current location while in ARE custody. Fields in the Current Location column on the first tab includes a drop-down list of active locations from the third tab. If a foster or location is no longer active, their status can be set to inactive by setting the "Active" column to "No", and they will no longer appear in the locations drop-down menu.

The fourth tab (Settings) includes lists that are used to populate the "Species" column on the first and second tab as well as the "Manner of Disposition" on the second tab. While several common options have been included, these lists may be modified to fit the ARE's needs.

## ANIMAL INTAKE RECORD

This form is intended to capture the name and unique identification of each animal, along with the intake date, complete source information (name, phone number, street address), and description of each animal at intake. When a new animal enters the ARE's custody, an intake record should be completed and placed in a folder created for that animal (within the first 24 hours in custody). The checklist at the bottom of the intake form provides reminders of additional documentation that should also be included in the animal's folder, including a photograph, Certificate of Veterinary Inspection (CVI), and rabies vaccination certificate (if applicable).

To ensure that animal records are easily managed, it is recommended to keep the intake photo with the other records. If utilizing a paper-based filing system, photos should be printed out and included in the animal's record file. Similarly, if animals were imported from outside of Oregon, and multiple animals are listed on the CVI, a copy of the CVI should be included in each animal's file.

## ANIMAL LOCATION/DISPOSITION RECORD

This form is intended to be utilized to record each location where an animal is kept while in the ARE's custody. When an animal is initially received into ARE custody, the location where they are initially placed should be recorded on this form, and the form should be added to their file. Any time the animal is subsequently moved (i.e. intake facility to foster, new foster, etc), the new location and the date of movement should be added to this record. This record also includes fields to record the final disposition of the animal.

## MEDICATION/VACCINATION RECORD

This form should be utilized to record any medications or vaccinations that are administered to an animal while in the ARE's care. Each dose that is administered must be individually recorded in the animal's record, indicating the medication type/concentration, dose administered, and the date of administration. When recording medications such as flea preventative, it is especially important to note the size/concentration administered, as well as the volume administered (i.e. Flea MedicationX – Cat 5-15lb – 1 vial). If desired, the animal care record may also be used to record

medications and vaccination, however, this form specifically provides columns for each piece of information that is required to be recorded for a medication/vaccination, helping to ensure that information is not inadvertently missed.

#### **ANIMAL CARE RECORD**

This form is intended to be utilized to capture additional information that is not specifically included on other records. Events such as the animal giving birth to offspring, weaning offspring, and taking the animal to the veterinarian should be recorded on this form. If desired, this form may also be utilized to record medications and vaccinations, however, it is important to ensure that all required information is recorded (medication, concentration, dose, etc).



# Animal Intake Record

Use this form to record information required to be collected at intake. All information must be recorded within 24 hours of intake by the Animal Rescue Entity. Information (and photos) provided by a source may not be used.

Animal Information				
Unique ID	Animal Name			Intake Date

Source Information			
Name		Phone Number/Email	
Street Address	City	State	Zip

Animal/Intake Information				
Age	<input type="checkbox"/> Day(s) <input type="checkbox"/> Month(s) <input type="checkbox"/> Year(s)	Sex <input type="checkbox"/> F <input type="checkbox"/> FS <input type="checkbox"/> M <input type="checkbox"/> MC	Species	Breed
Weight	<input type="checkbox"/> Lb(s) <input type="checkbox"/> Kg(s)	Description of Condition		
Microchip			Tattoo, other identification	
Other defining characteristics of the animal or details about intake				

Out-of-State Animals		
CVI Number	Veterinarian Issuing CVI	Date of Rabies Vaccine

Additional Information to Include In File
Additional Information to include in animal record: <ul style="list-style-type: none"><li><input type="checkbox"/> Photograph taken within 24 hours of intake – Must clearly show identifiable markings and be sufficient to identify this animal.</li><li><input type="checkbox"/> Certificate of Veterinary Inspection (CVI) – if animal originated outside of Oregon, include a copy of the original CVI in the file.</li><li><input type="checkbox"/> Rabies Vaccination Certificate – if animal originated outside of Oregon, include a copy of the rabies certificate (if not documented on the CVI).</li></ul>

# Animal Location/Disposition Record

Use this form to record information required to maintained for each location where an animal is kept while in custody.

Animal Information				
Unique ID		Animal Name		
Locations Kept While in ARE Custody				
Location 1	Start Date	End Date	Location Type: <input type="checkbox"/> Physical Location <input type="checkbox"/> Foster <input type="checkbox"/> Other:	
	Facility/Foster Name		Phone Number/Email	
	Street Address		City	State   Zip
Location 2	Start Date	End Date	Location Type: <input type="checkbox"/> Physical Location <input type="checkbox"/> Foster <input type="checkbox"/> Other:	
	Facility/Foster Name		Phone Number/Email	
	Street Address		City	State   Zip
Location 3	Start Date	End Date	Location Type: <input type="checkbox"/> Physical Location <input type="checkbox"/> Foster <input type="checkbox"/> Other:	
	Facility/Foster Name		Phone Number/Email	
	Street Address		City	State   Zip
Location 4	Start Date	End Date	Location Type: <input type="checkbox"/> Physical Location <input type="checkbox"/> Foster <input type="checkbox"/> Other:	
	Facility/Foster Name		Phone Number/Email	
	Street Address		City	State   Zip
Animal Disposition				
Date		Disposition Type: <input type="checkbox"/> Adoption <input type="checkbox"/> Transfer <input type="checkbox"/> Euthanasia <input type="checkbox"/> Deceased <input type="checkbox"/> Other:		
Individual/Entity taking custody		Phone Number/Email		
Street Address		City	State	Zip

# Medication/Vaccination Record

Use this form to record medications and vaccinations administered to each animal in custody.

[illegible]

# Animal Care Record

Use this form to record information for each animal in custody such as offspring, veterinary care, movements, etc.

[illegible]