Animal Control Module

Animal Control Guide

This is the iSOMS Animal Control Guide, which explains how to use the Animal Control module. The iSOMS Animal Control module allows you to record a variety of information on animals, such as individual animal records, bite incidents, animal complaints, donations, euthanizations, registrations, and traps. This guide explains the purpose of each section of the Animal Control module, the way to add and edit records in each section, and how to run reports on each section. At the end of the guide is a short quick reference section that explains where to look to answer some typical questions you may have.

Animal Control Module Features

➢ Animal Records at the Shelter or Agency

➢ Bite Incident Records

➢ Complaints or Calls concerning Animals

➢ Donations to the Animal Shelter

➢ Lost and Found Animals

➢ Animal Euthanizations or Tranquilizations

➢ Animal Registration & Tags

➢ Animal Traps

Animal Control Module

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Animal Control Module

Animal Shelter

The **Animal Shelter** module will keep track of the animals at your agency and information about them, such as vet, department, rescue group, monetary or other receipts, and so on. You can also generate reports to quickly view information about those records.

To add or search for an animal's record, begin on the iSOMS home screen. Navigate to:

Records → Back Office → Animal Control → Animal Shelter

Searching for Animal Shelter Records

This will open the **Animal Shelter: Search** screen. Here you can look up current animal records if you need to view or edit their record. To look up a record, type in the search filter fields and click on one of the **Lookup** buttons.

Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.)

Important Lookup Fields

You can filter for **Animal Name**, **Species,** and **Breed** to find animals quickly.

You can use **Rescue Group** or **Department** to filter for who found the animal or the department where the animal is being kept.

Quick Searches

If you want to find records of all active animals at your agency, click **All Active Animals** to quickly search for them.

ALL ACTIVE ANIMALS

If you want to find records of animals that have an estimated disposition date entered, click **Past Estimated Disposition.**

PAST ESTIMATED DISPOSITION

Whether you did a quick search or a standard search, you can double click on the entry or click on the pencil icon on the far right (✏) to open the screen to view, edit, or delete it.

Search Criteria ▼

Search Results

19 Records

Intake Date	Est. Disposition Date	Disposition Date	Ticket #	How Received
12/12/2000 00:00			07049	WALK-IN
08/18/1999 00:00			45099	WALK-IN
08/18/1999 00:00			45088	WALK-IN
08/09/1999 00:00			44972	WALK-IN
06/03/2013 00:00	01/31/2008		20500	OFFICER
08/18/1998 00:00			41626	WALK-IN
08/25/1998 00:00			41685	WALK-IN
09/21/1998 00:00			41910	WALK-IN
09/11/2006 00:00	09/14/2006		18833	WALK-IN

Adding Animal Shelter Records

In order to add a new animal shelter record, click on the **New Record** button on the search screen.

Click **Yes** when prompted for confirmation.

Transferring CAD to Shelter Records

Shelter Records can also be created by transferring information from the *Complaint Cards* module for **CAD**. If you have a Complaint Card you wish to transfer, navigate to it in the CAD section of iSOMS, and find the Complaint Card you want to transfer to **Animal Shelter Records**.

Navigate to **COMMUNICATIONS** → **COMPLAINT CARDS**	Locate the entry you wish to transfer into a **Shelter Record**.

Then click **Transfer Card** and select *Shelter Ticket* to copy this information to the desired module. Select the appropriate Case Number and hit **Transfer.**

Filling in Shelter Fields

After transferring or adding a new record, you will be brought to a screen where you can add information on the animal record you want to add.

IMPORTANT: Optional items will be listed in **blue**. You can skip these items if not needed, or if you don't know if you need them.

Intake Date and Time will be automatically set to the current day and time. If the intake date and time are not for today, you can change these here.

The **Ticket Number** will be automatically generated, but if you have your own system, you can change it here.

Add the name of the officer who made the report in **Report By**. You can simply type in the box or search manually by using the magnifying glass. (See *Appendix B, Searching Officers* on page 194 if you want more information on this.)

Animal Control Module

> *Several of the following fields are dropdowns*. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.)

Add the **Surrender Reason** for why the animal was surrendered.

Surrender Reason:
CRUELTY INVESTIGATION

▼ Shelter Codes
▶ Surrender Reason

Record how the animal was received in **How Received**.

How Received:
WALK-IN

▼ Shelter Codes
▶ How Received

Record where the animal will be housed in **Kennel.**

Kennel:
KENNEL - 28   ✕ ▾

▼ Shelter Codes
▶ Kennels

If you are not going to bill for keeping the animal, you can check the **Complementary Hold / No Bill** Checkbox:

☑ Complementary Hold/No Bill

The next set of fields is for recording the place where the animal was picked up by your agency / department. **Common Name** is the common or business name of the place you picked it up, such as the mall or "The Green", for example. **Subdivision / Area / Building Complex** and **Zone** offers options of places where the animal was found. These are determined by your agency.

Common Name:
The Mall

Subdivision/Area/Building Complex:
DOE   ✕ ▾

Zone:
0101 101 ZONE 1   ✕ ▾

▼ Agency Codes
▶ SubDivisions
▶ Zones

Enter the address fields for the location where the animal was found, if any.

| Pickup Address: | House #: 1110 | Direction: | Street: Merchant Dr | Apt/Lot #: | City: KNOXVILLE | State: TN | X ▼ |

ZipCode: 37912 📍

Latitude: 36.00317781   Longitude: -83.98270133 🔍

If this animal needs to be excluded from the public website or from reports, check **Exclude from Website** or **Exclude from Reports** as appropriate.

☑ Exclude From Website   ☐ Exclude From Reports

If you would like to add an image of the animal, you can click **Upload Image (☁) or Take New Photo (📷)** on the right. Select or take the image and it will be added.

Image #: 0 of 0

Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

Save is located at the top of the screen.

SAVE   DELETE
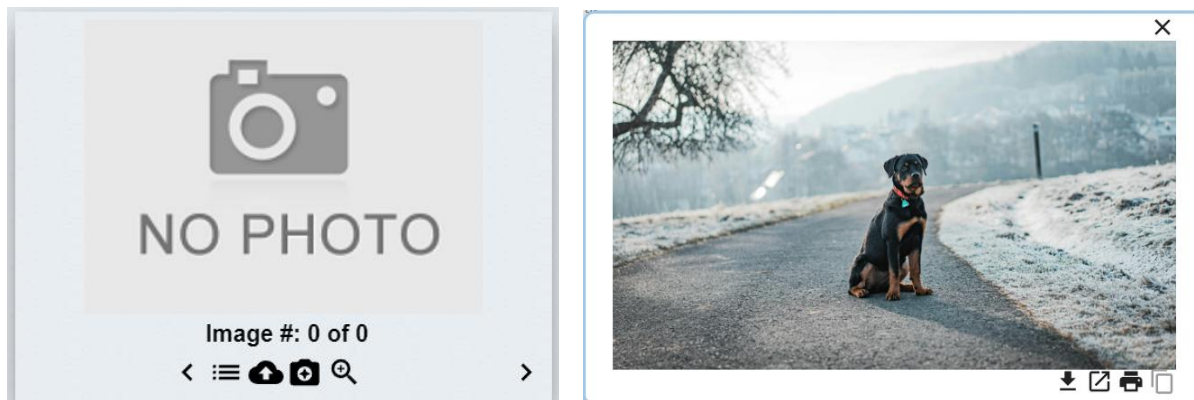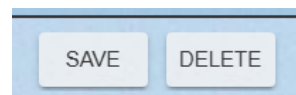
Now that you have filled out the fields, you can use the tabs below the fields to record additional information on the item. See the *Shelter Tabs* section for more info.

Animal Shelter Tabs

Summary

Fill out the tabs below the fields for animal shelter records as needed. The **Animal** tab should be filled out after you create the entry. Use **Vet, Status, Department, Rescue Group, and Receipts** to keep track of the animal's state, disposition status, history, and receipts for animal care.

Notes, Images, and **Attachments** tabs are available if you need to take additional notes or upload images and documents. (Notes, Images, and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)

Tab Details

Animal Tab

The **Animal** tab lists information about this specific animal. You should fill out as much of this tab as possible on every *Animal Shelter* record.

Enter the **Name, Species, Breed,** and **Sex** of the animal.

Animal Name:	Species:
ACE	DOG

Breed:
MIXED ROTTWEILER

Sex:
MALE

▼ Animal Codes
▶ Animal Names
▶ Species
▶ Breed
▶ Sex
▶ Size
▶ Color
▶ Coat
▶ Hair Length
▶ Ear Length
▶ Tail Length
▶ Age Class
▶ Demeanors

Add the **Weight, Height,** and **Size** of the animal.

Weight:	Height:
80	203

Size:
MEDIUM

Add more details about the animal, such as the **Color, Coat, Hair Length, Ear Length, Tail Length, Age Class,** and **Age.**

Color:	Coat:	Hair Length:
BEIGE	COAT	M

Ear Length:	Tail Length:	Age Class:	Age:
LONG	SHORT	ADULT	5

Add if the animal is **Known to Bite** and the general **Demeanor** of the animal .

Known to Bite:	Demeanor:
N	FRIENDLY

If the animal has a microchip or reg. tag #, you can add those here. You can also add **Tag Years** left and **Expiration Date** of the tag.

Microchip Id:	Registration Tag #:
12345	67890

Tag Years:	Expires On:
2	12/30/2026

Vet Tab

Vet	S

The **Vet** tab lets you select a company / business as the animal's vet for record purposes. If you already have the organization in your records, simply type the name (such as **FRIENDLY VET**) and it will appear automatically. If you don't have the vet or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Animal Vet:

BLOUNT VET   SEARCH   EDIT   ADD

Address 1: 321 PATTON ST

Address 2:   **Apt/Suite #:**

City: MARYVILLE   **State:** TN   **Zip Code:** 37804

Phone: **Email:**

Latitude: 35.7577279   **Longitude:** -83.9698221

Maintain Files Codes

▼ **Business Codes**

▶ Animal Vets

Status Tab

The **Status** tab lets you keep track of the animal's status, disposition, euthanization, spay/neuter date, who rescued the animal, and who the animal was released to.

What to Do When the Animal is Received for the First Time

First, add the animal's **Estimated Dispositon Date** if you know when the animal is likely to be released or have a change of disposition.

If the animal is a stray, mark the **Stray** textbox.

If the animal was brought by or released to a **Rescue Group,** you can mark that under this tab *OR* the *Rescue Group* tab. If you already have the organization in your records, simply type the name (such as **RESCUE GROUP**) and it will appear automatically. If not, see *Appendix C, Business Records* on page 195 for instructions on adding, searching, and editing business records in iSOMS.

What to Input in the Status Tab Later

Add the **Disposition** and **Disposition Date / Time** if the animal's disposition changes.

Disposition:
ADOPTED

▼ Shelter Codes
► Dispositions

Disposition Date:
03/03/2025

Time:
12:00:00

The name of the officer who releases the animal or changes the disposition should be filled in the **Disposition By** field. You can simply type in the box or search manually by using the magnifying glass. (See *Appendix B, Searching Officers* on page 194 if you want more information on this.)

Disposition By:
603 ELDER, MARTIN WILLIAM -INV

If the animal must be euthanized, you can mark the date here in **Euthanized / Put Down Date.** This will be auto-filled if you create an euthanization record in the *Euthanizations* module. You can view the record by clicking the **View Euthanization Record,** or, if one does not exist, click the button will give you the option to create such a record. (See *Euthanizations* on page 118 for more information.)

Euthanization/Put Down Date:
12/01/2024

VIEW EUTHANIZATION RECORD

If the animal is returned to your agency's care, you can add the date for that in **Return Date**.

Returned Date:
12/31/2024

If the animal is spayed or neutered, add the date in **Spay / Neuter Voucher Return Date.**

Spay/Neuter Voucher Return Date:
01/03/2025

▼ Shelter Codes
► Relationships

If the animal is released to an individual, you can add those details here.

	Last Name:	First Name:	Middle Name:	Jr/Sr:	Relationship:	
Released To:	DOE	JAMES			OWNER	
	Phone #:	House #:		Street:		City:	State:	ZipCode:
	(865)-555-1234	123	Direction:	PATTON ST	Apt/Lot #:	MARYVILLE	TN	37804

Animal Control Module

Department Tab

The **Department** tab lets you select a department relevant to the animal, such as the one keeping the animal. If you already have the department in your records, simply type the name (such as **DEPARTMENT OF ANIMAL SHELTER**) and it will appear automatically. If you don't have the department in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Rescue Group Tab
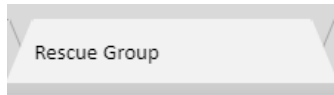
Rescue Group

The **Rescue Group** tab lets you select the rescue group that brought you or took the animal. If you already have the group in your records, simply type the name (such as **SUPER PET RESCUE GROUP**) and it will appear automatically. If you don't have the group in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Rescue Group:

ATLANTA PET RESCUE   SEARCH   EDIT   ADD

Address 1:

Address 2:   Apt/Suite #:

City: State: Zip Code:

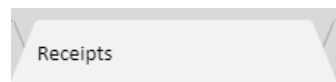Phone: Email:

Latitude: Longitude:

Maintain Files Codes

▼ Business Codes

▶ Animal Rescues

Receipts Tab

Receipts

The **Receipts** tab keeps track of the payment receipts to your agency. To view the details of an entry, click on it. If you want to *print* a receipt, click the printer (🖶) symbol on the far right. If you want to *void* a receipt, click the cancel (⊘) symbol on the far right. **You can add or void receipts, but not edit them here.**

GENERATE RECEIPT

EXPORT GRID TO FILE

1 Receipt

Receipt Date	Employee	Receipt #	Amount	Payment Type	Document #	Void Date		
12/31/2024 10:05	NAME, YOUR	202400001	$32.00	CASH			⊘	🖶

BOARDING FEE - $7.00
QUARANTINE FEE - $25.00

Adding a New Receipt

Click **Generate Receipt** in the upper left corner of the tab's section. This will open the *Add Receipt* window:

Add Receipt

Receipt Date:
12/31/2024   📅

Receipt #:
* SYSTEM GENERATED *

Billed Days:
1   **Boarding Daily Rate: $0.00**

Payment Type:

Document #:

Comment:

ADD   CANCEL

BOARDING FEE - $7.00
EUTHANIZE FEE - $0.00
FINE - $0.00
IMPOUND FEE - $0.00
LAB FEES - $0.00
LICENSE FEE - $10.00
MICROCHIP FEE - $0.00
OTHER FEE - $0.00
QUARANTINE FEE - $25.00
RABIES FEE - $4.00
RENEWAL LICENSE FEE - $10.00
RETURN ALTERED FEE - $0.00
UN-ALTER FEE - $0.00

Receipt Total: $0.00

Here you will add the payment received for animal care, the document number, any relevant comment, and choose the fees.

Continued on next page.

First, add the amount of days to be billed for in the **Billed Days**. A Super User can set the billing rate in *Company Setup* with the DAILY BILL RATE setting. (See the end of this tab's section for more information.)

Billed Days:

3   **Boarding Daily Rate:**

Now add the **Payment Type** as received from the person paying.

Payment Type:

CHECK   ×   ▼

Add a **Document Number,** such as a check number or invoice, as appropriate, and then any needed comments.

Document #:

1234

Comment:

COMMENT HERE

Now check the boxes for the fines and fees to set the amount of payment needed:

☐ ADOPTION FEE - $0.00	▼ **Agency Codes**
☐ ADOPTION UN-ALTERED FEE - $0.00	
☐ ALTER FEE - $0.00	▶ Fee Codes
☐ BOARDING FEE - $7.00	
☐ EUTHANIZE FEE - $0.00	
☐ FINE - $0.00	
☐ IMPOUND FEE - $0.00	
☐ LAB FEES - $0.00	
✓ LICENSE FEE - $10.00	
☐ MICROCHIP FEE - $0.00	
☐ OTHER FEE - $0.00	
✓ QUARANTINE FEE - $25.00	
☐ RABIES FEE - $4.00	

Receipt Total: $35.00

When finished, click **Add** to save and add the receipt.

Changing Daily Bill Rate for Animal Shelter

On the Home page, choose **Admin → Agency → Company Setup**

Usually, only **Super Users** can change the bill rate or other similar values.

On the *Company Setup Search* screen, select **ALL** and then double click your agency's name on the table.

Select the **Settings** tabs on the next screen of Company Setup.

Scroll down the page and click on the **Program** drop-down menu. Use the drop-down menu and choose **Animal Shelter** to get to the Animal Shelter settings.

Then double click on DAILY BILL RATE. Double click on that row and answer the setting with the charge for daily board bill rate for animal shelter, then **Save.**
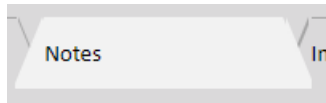
Notes Tab

The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

		Entry Date	Note Date	Employee	Note Type	Notes
✏️	🖨️	08/23/2024 14:22:56	08/23/2024 14:22:56			TAKE NOTE

TAKE NOTE

Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.

Main Narrative

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis

Use **Add Note** to add a new note.

ADD NOTE

The **View Story** button will show all notes (except Narrative) that have been added on one page.

Images Tab

Images   At

The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.
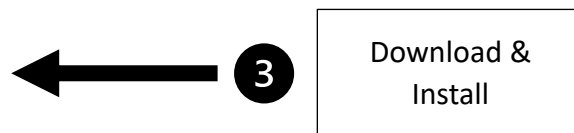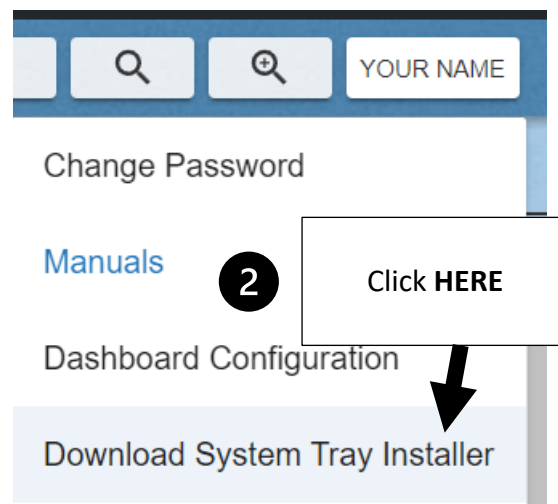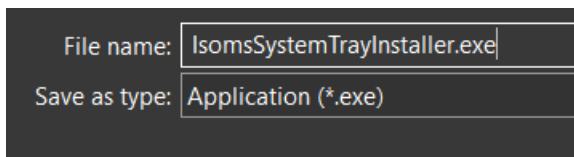
| DOWNLOAD ALL IMAGES | EXPORT GRID TO FILE | ADD IMAGE | ADD IMAGES |

To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

Q   Q   Q   YOUR NAME

AUDITS   TOPICS   REPORTS   MAINTAIN FILES

Click **YOUR NAME**

❶

Q   Q   YOUR NAME

Change Password

Manuals   ❷   Click **HERE**

Dashboard Configuration

Download System Tray Installer

File name: IsomsSystemTrayInstaller.exe

Save as type: Application (*.exe)

❸   Download & Install

After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab
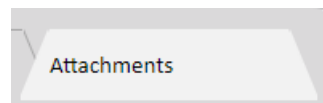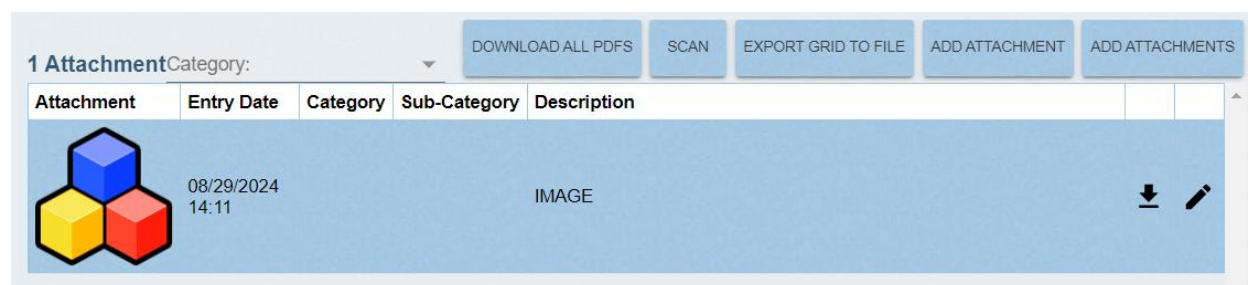

The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the ⬇ icon to download the attachment to the computer.

You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.

You can also **Download All PDFs** at once by clicking the appropriate button.

DOWNLOAD ALL PDFS

File name:	files.pdf
Save as type:	PDF File (*.pdf)

If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

SCAN

Scan Attachment

ISOMS Windows App Must Be Running

File Name: _____   Report Date: _____ 📅

Category: _____ ▼   Sub-Category: _____ ▼

Description:

CANCEL   SCAN DUPLEX   SCAN AUTO

Animal Shelter Reports

iSOMS allows you to print different types of reports for animals:

- **List Reports**
- **Details Reports**
- **Boarding Bill Reports**
- **Receipts Reports**
- **Monthly Reports**

- **Rescue Group Reports**
- **Species Stats Reports**
- **Form Reports**
- **Custom Reports**

To access the reports, begin on the iSOMS home screen and navigate to:

Records → Back Office → Animal Control → Animal Shelter

Now click on the **Reports** button in the upper right corner and choose the report you would like to run.
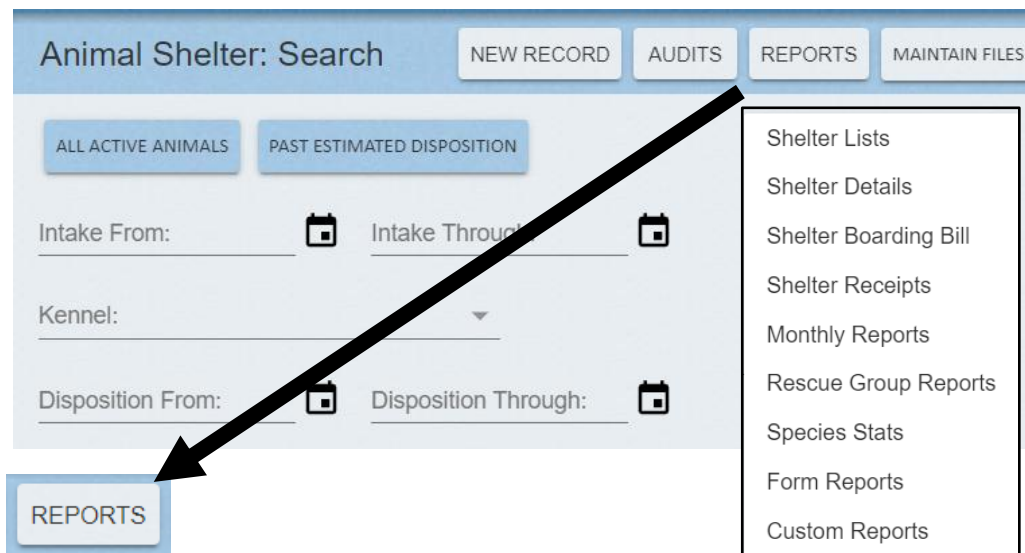
Shelter Lists

Shelter List reports a list of animals over a certain intake date range so you can quickly view the animals present in the shelter. *Report Style* has an option to create a press release list report.

Animal Shelter: List Reports

Report Style
List

Intake From: Intake Through:
01/01/2024   12/31/2024   ☐ Active Only

Set your parameters for the report and click **View** or **Download** to view the report.

YOUR AGENCY
Animal Shelter List
Intake Dates From 01/01/2024 Through 12/31/2024   Page   1   of   1

Kennel	Intake Date	Ticket #	Species	Breed	Color	Bites
	04/15/2024	2024-0001				

How Received: Surrender Reason:
  Disposition: Disposition Date:

Kennel	Intake Date	Ticket #	Species	Breed	Color	Bites
28	12/30/2024	2024-0002	DOG	MIXED ROTTWEILER	BEIGE	NO

How Received: **WALK-IN**   Surrender Reason: **CRUELTY INVESTIGATION**
  Disposition: **RESCUE GROUP**   Disposition Date:

Count: **2**

YOUR AGENCY
Animal Shelter Kennel Work Sheet
Intake Dates From 12/01/2024 Through 12/31/2024   Page   1   of   1

Kennel	Intake Date	Ticket #	Species	Sex	Department	Bites
28	12/30/2024	2024-0002	DOG	MALE		NO ☐

  Breed: **MIXED ROTTWEILER**   Notes:
  Color: **BEIGE**

Count: **1**

YOUR AGENCY
Animal Shelter Press Release
Intake Dates From 12/01/2024 Through 12/31/2024   Page   1   of   1

Intake Date	Species	Breed	Sex	Color	Age	Department	Est. Disp. Date
12/30/2024	DOG	MIXED ROTTWEILER	MALE	BEIGE	5		02/01/2025

Count: **1**

Details Report

Details Report goes over animals in detail so you can view records in an information-complete report. You can also set it to a specific animal if you click the **Reports** button from that animal's record.

Animal Shelter: Detailed Reports

Intake From:	Intake Through:	
12/01/2024	12/31/2024	☐ Active Only

Surrender Reason: ▾   How Received: ▾

Species: ▾   Breed: ▾

Street: City: ▾   Report By: ▾ 🔍

Subdivision/Area/Building Complex: ▾   Zone: ▾

Department: [SEARCH]   Rescue Group: [SEARCH]

Set your parameters for the report and click **View** or **Download** to view the report.

YOUR AGENCY
Animal Shelter Details
Intake Dates From 12/01/2024 Through 12/31/2024   Page   1   of   1

Shelter Details

Intake Date: **12/30/2024 13:29**	Report By: **ELDER, MARTIN**
Case Number: **2024-0002**	Surrender Reason: **CRUELTY INVESTIGATION**
Kennel: **KENNEL - 28**	How Received: **WALK-IN**
Common Name: **THE MALL**	Department:
Pickup Address: **1110 MERCHANT DR**	Apartment:
CSZ: **KNOXVILLE, TN 37912**	Coords: **36.00317781, -83.98270133**
Zone: **ZONE 1**	SubDivision: **DOE**
Indigent: **NO**	Stray: **NO**
Est. Disposition Date: **02/01/2025**	Disposition Date:
Disposition: **RESCUE GROUP**	Disposition By:
Euthanization Date:	Returned Date:
Neuter Voucher Return:	Rescue Group: **ATLANTA PET RESCUE**
Released To:	Bill Days: **3**
Address:	Apartment:
CSZ:	

Animal Details

Name: **ACE**	Species: **DOG**
Breed: **MIXED ROTTWEILER**	Sex: **MALE**
Weight: **80**	Height: **203**
Size: **MEDIUM**	Color: **BEIGE**
Coat: **COAT**	Hair Length: **M**
Ear Length: **LONG**	Tail Length: **SHORT**
Age Class: **ADULT**	Age: **5**
Bites: **NO**	Demeanor: **FRIENDLY**

Boarding Bill Report

Boarding Bill report lists the amount of board days to calculate the total board billing for the animal shelter (by department) over a date range.

Set your parameters for the report and click **View** or **Download** to view the report.

Receipt Reports

Receipt Reports will list receipts on a report over a certain date range.

Animal Shelter: Receipt Reports

Receipts From:
12/31/2024

Receipts Through:
12/31/2024

Report Format:
- ( ) PDF
- ( ) Excel
- ( ) XML
- ( ) SQL

VIEW DOWNLOAD EMAIL CLEAR FILTER

Set your parameters for the report. Make sure to add at a date range in **Receipts From** and **Receipts Through**. Click **View** or **Download** to view the report.

YOUR AGENCY

Shelter Receipts

Dates from 12/31/2024 Through 12/31/2024   Page   1   of   1

Receipts

Receipt Date	Receipt #	Case #	Tag #	Amount	Void Date
12/31/2024 10:05	202400001	2024-0002	67890	$32.00	
Reference #:			Receipt By:		
12/31/2024 10:57	202400002	2024-0002	67890	$42.00	
Reference #:			Receipt By:		
	Total Receipts: **2**		Total Amount: **$74.00**		

Fee Types

Description	Count	Amount
BOARDING FEE	2	$14.00
QUARANTINE FEE	2	$50.00
RENEWAL LICENSE FEE	1	$10.00
	5	$74.00

Pay Types

Description	Count	Amount
CASH	2	$74.00
	2	$74.00

Monthly Reports

Monthly Reports will list information you might want to know monthly about the animal shelter for a date range. You can do a report by *Department* or by *Officer*. Set your parameters for the report. Make sure to add at a date range in **Date From** and **Date Through**. Click **View** or **Download** to view the report.

Rescue Group Reports

Rescue Group reports will list information on Animal Rescue Groups. You can do a report as a *Stats Report* or an *Audit Report*. Set your parameters for the report. Make sure to add at a date range in **Date From** and **Date Through**. Click **View** or **Download** to view the report.

Species Stats Reports

Species Stats reports will list information on the animal records with the count and percentage by species. Make sure to add at a date range in **Date From** and **Date Through**. Click **View** or **Download** to view the report.

Species	Count	Percentage
* NO SPECIES *	5	38.46%
C	3	23.08%
DOG	1	7.69%
F	4	30.77%

Count: 13

Bite Incidents

The **Bite Incidents** module will keep track of incidents that occur with animals at your agency (especially bites) and generate reports to view information about those records. You are able to record information about the owner, the victim, any others involved, the department involved, and any additional notes.

To add or search for an animal's bite record, begin on the iSOMS home screen and navigate to:

Records ➔ Back Office ➔ Animal Control ➔ Bite Incidents

Searching for Bite Incident Records

This will open the **Shelter Incident Search** screen. Here you can look up current incidents if you need to edit their record. To look up a record, type in the search filter fields and click on one of the **Lookup** buttons.

Important Lookup Fields

> Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.)

You can filter for **Animal Name**, **Species,** and **Breed** to find animals quickly.

	Last Name:
Owner Name:	DOE
	Last Name:
Victim Name:	SMITH

You can use **Owner Name** or **Victim Name** to filter for the person owning the animal or the person who was bit.

After you do your search, you can double click on the entry or click on the pencil icon on the far right (✏) to open the screen to view, edit, or delete it.

Search Criteria ▶

Search Results

250 Records

Report Date	Case Number	Bite Date	Victim Type	Bite Location	Owner Last Name	Owner First Name	
03/30/2021		03/30/2021			DOE	ADAM	✏
04/29/2014	202717690						✏
05/06/2013	201377378	05/01/2013			SMITH	TOMMY	✏

Adding Bite Incident Records

In order to add a new bite incident record, click on the **New Incident** button on the search screen.

This will bring you to the **Incidents: Master Name Search** screen. This screen allows you to either find someone's name in the Master Name records or enter a new name. You need to use an existing Master Name or create a new Master Name if you want to create a new incident record. This will allow you to use information already present in iSOMS and link your bite incident report directly to the Master Name and jacket number.

If the animal owner in already has a record in iSOMS, you can enter information to narrow the search and click "**Lookup.**" Clicking **"All"** will show all Master Names in your system. If you are searching for a Master Name, once you enter any information to narrow the search and click "**Lookup,**" the next screen will show any results that matched your search, and you can choose the Master Name by clicking on it twice.

If the animal owner has no Master Name in the database, you need to create a new one by clicking **"New Master Name"** in the upper right. (See **Creating a New Master Name** in the iSOMS *Corrections Manual* for more information if you need it.)

Once you double click the row with the correct name, the Master Name will appear and fill in information for you. Click **"Save & Create Incidents Record"** at the top of the screen to begin the incident record.

If you have not entered much information yet, you will get a data entry warning. But this will not happen if the Master Name has been sufficiently filled in before. In any case, the Master Name will fill in as the Owner's information on the newly created Incident.

Filling in Bite Incident Fields

After creating a new record, you will be brought to a screen where you can add information on the incident you are going to add.

IMPORTANT: Optional items will be listed in **blue**. You can skip these items if not needed, or if you don't know if you need them.

Report Date and Time will be automatically set to the current day and time. If the report date and time are not for today, you can change these here.

The **Case Number** will be automatically generated, but if you have your own system, you can change it here.

Add the name of the officer who made the report in **Report By**. You can simply type in the box or search manually by using the magnifying glass. (See *Appendix B, Searching Officers* on page 194 if you want information on this.)

Add the **Bite Date** and **Time** to list when the bite incident occurred.

Bite Date:		Time:
12/01/2024	📅	12:30:00

> Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.) Codes are listed along the right side for reference.

Add the **Victim Type** for the type of victim, such as another animal, an adult, or a juvenile.

Victim Type:
ANIMAL   ✕   ▼

▼ Incident Codes
▶ Victim Types

Record the **Bite Location** on the victim.

Bite Location:
LF FOOT   ✕   ▼

▼ Incident Codes
▶ Bite Locations

Note if the victim sought treatment in **Treatment Sought:**

☑ Treatment Sought

▼ Incident Codes
▶ Dispositions

If the animal involved in the incident has a **Disposition**, add it here:

Disposition:
CITATION ISSUED   ✕   ▼

If a citation was issued, you should add the **Citation Number** and which officer gave the citation in **Citation By.** (For more info on putting officers in, see *Appendix B* on page 194.)

Citation Number:
12345

Citation By:
603 ELDER, MARTIN WILLIAM -INV   ✕   ▼   🔍

The next set of fields is for recording the place where the animal was picked up by your agency / department. **Common Name** is the common or business name of the place you picked it up, such as the mall or "The Green", for example. **Subdivision / Area / Building Complex** and **Zone** offers options of places where the animal was found. These are determined by your agency.

Common Name:
The Mall
Subdivision/Area/Building Complex:
DOE
Zone:
0101 101 ZONE 1

▼ **Table Codes**

▶ SubDivisions

▶ Zones

Enter the address fields for the location where the animal was found or the incident occurred, if possible.

	House #:	Direction:	Street:	Apt/Lot #:	City:	State:
Pickup Address:	1110		Merchant Dr		KNOXVILLE	TN

ZipCode:
37912

Latitude: 36.00317781   Longitude: -83.98270133

If the victim was contacted by your agency, add that information here and who contacted the victim. (For more info on putting officers in, see *Appendix B* on page 194.)

✔ Victim Contacted	Contacted Date: 12/27/2024	Time: 15:00:00	Contacted By: 603 ELDER, MARTIN WILLIAM -INV

Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

Save is located at the top of the screen.

SAVE   DELETE

Now that you have filled out the fields, you can use the tabs below the fields to record additional information on the item. See the next section for more info.
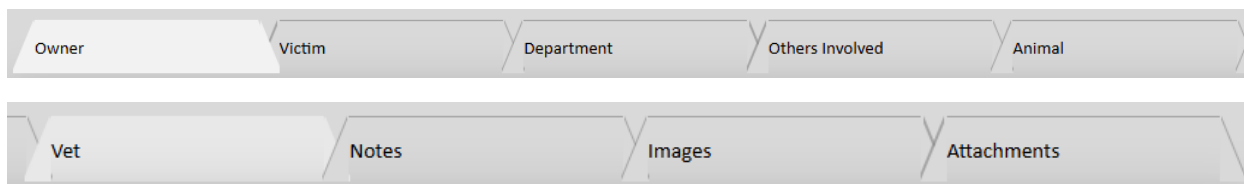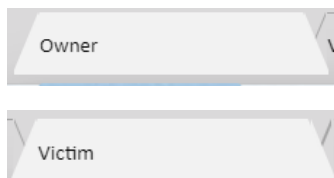
Bite Incident Tabs

Summary

Fill out the tabs below the fields for bite incident records as needed. The **Owner** tab will be filled out when you create the record. Use **Victim, Department, Others Involved, Animal,** and **Vet** tabs to fill out information about the victim of the bite, relevant department, other individuals involved in the incident, the animal involved, and any vet that is relevant to the incident or response.

Notes, **Images,** and **Attachments** tabs are available if you need to take additional notes or upload images and documents. (Notes, Images, and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)

Owner and Victim Tabs

The **Owner** and **Victim** tabs lists identifying information about the animal's owner and victim. You should fill out as much of this tab as possible on every *Bite Incident* record. The owner tab will usually be filled out via the Master Name you used when you created the incident record.

If you need to link to a different Master Name, you can use the **Search People** button to link to a different Master Name and get the information filled in again.

Department Tab

| Department | |

The **Department** tab lets you select a department relevant to the animal, such as the one keeping the animal. If you already have the department in your records, simply type the name (such as **DEPARTMENT FOR BITE INCIDENTS**) and it will appear automatically. If you don't have the department in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Department:

ALCOA   SEARCH   EDIT   ADD

Address 1: 123 FAKE ST

Address 2:   **Apt/Suite #:**

City: ALCOA   **State:** TN   **Zip Code:** 37912

Phone: (865) 555-1234   **Email:** EMAIL@WEBSITE.COM

Latitude: 36.0091467   **Longitude:** -83.9797173

Maintain Files Codes

▼ **Table Codes**

▶ Departments

Others Involved Tab
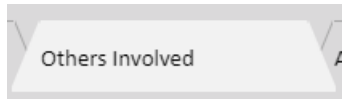
Others Involved

The **Others Involved** tab lets you record any other individuals (besides owner and victim) that were involved in an incident and details relevant to the incident. To view, edit, or delete a current entry, double-click an entry from the table.

When you add a new entry, you should fill out only the tabs you need to fill out to track information and then save it. Details are provided for each of the sub-tabs below, although each sub-tab is relatively intuitive. Add information as needed.

1 Person   EXPORT GRID TO FILE   ADD PERSON

	Entry Date	How Involved	Relationship	Last Name	First Name	Middle	Post Name	DOB	Age	Home Phone
✎	12/31/2024			DOE	JANE	F		05/15/1995	29	

In order to add a new entry, click the **Add Person** button. Confirm you want to add a new person involved, and then you will see the options to fill in the fields.

ADD PERSON

View Others Involved

| SEARCH PEOPLE | How Involved: | Relationship: | SCAN DL |

CHECK NCIC

☐ Hide Name on Report   ☐ Hide Details on Report   ☐ Safety Restraints Used

Last Name: DOE   First Name: JAMES   Middle Name: RANDAL   Jr/Sr:

Nickname/AKA:

House #: 1142   Direction: Street: OXFORD HILLS   Apt/Lot #:   City: MARYVILLE

State: TN ✕   ZipCode: ⚲   County:

Home Phone: (865)-111-1111   Cell Phone: Work Phone: Email:

NO PHOTO

Image #: 0 of 0

Biographical   Employer   Juvenile / Child Info

The fields at the top list the person's involvement and relationship to the people involved. Then identifying fields are below, along with additional headers to add extra info such as *Biographical, Employer,* and *Juvenile / Child Info*. For details, see below.

Quick Fill from Master Names

If you already have information on someone as a Master Name, then you can add it quickly by clicking the **Search People** button in the upper left.

SEARCH PEOPLE

This will open the Master Name search screen. Input a name and other identifying info (such as DL number or SSN, etc.), then click **Lookup.**

Select the person from the list to add them, and then click **Save and Select** in the *Others Involved* tab. This will autofill information you have on them.

Filling in Information

How Involved:
PROPERTY OWNER ✕ ▾   Relationship: SCAN DL

First, fill in **How Involved** dropdown with how the person is connected to the incident.

How Involved:
PROPERTY OWNER ✕ ▾

Add the **Relationship** this person has to the other people involved.

Relationship:
BROTHER

Now you can scan the person's driver license if you click **Scan DL**.

SCAN DL

☐ Hide Name on Report ☐ Hide Details on Report ☐ Safety Restraints Used

If you need to hide this name or details about the report, check **Hide Name** or **Hide Details**.

If the person had to be restrained, check **Safety Restraints Used.**

Now fill out the information about the person if necessary:

Last Name: First Name:
DOE   JAMES   Middle Name: Jr/Sr: ▾

Nickname/AKA:

House #:   Street: City:
123   Direction: MADE UP ST   Apt/Lot #:   MURFREESBORO

State: ZipCode: County:
TN ✕ ▾   55555   📍   RUTHERFORD

Home Phone: Email:
(865)-555-6789   Cell Phone: Work Phone: email@email.com

Headings

Below the main fields, the headings are available to type additional information about the person.

Fill in the biographical information under this heading, including SS and DL numbers.

Here you can add an employer record. The Employer system works by storing records of employers. This makes it so that you do not have to continuously re-enter the same information on the same business. See *Appendix C, Business Records* on page 195 for more information.

Juvenile / Child Info

Here you can fill out information on the individual if they were a juvenile / child.

Social Security #: 123-45-6789

Date of Birth: 11/20/2010 📅 (Age: 13)

Person Type(forms): CHILD ✕ ▾

Level Of Education: 7 TH GRADE ✕ ▾

School: FORT CRAIG SCHOOL ✕ ▾

Notes: NOTES

Add the **Level of Education** and **School** along with any necessary **Notes**.

This completes filling out the *Others Involved* entry. Click **Save** in the bottom right to finish this entry. If you have any more to add, simply repeat the process.

SAVE   DELETE   EXIT

Animal Control Module

Animal Tab

Animal

The **Animal** tab lists information about the animal that was involved in the incident. You should fill out as much of this tab as possible on every *Bite Incident* record.

Animal Name:	Species: ▼	Breed: ▼
Sex: ▼	Weight: 0 Height: 0	Size: ▼
Color: ▼	Coat: ▼	Hair Length: ▼
Ear Length: ▼	Tail Length: ▼	Age Class: ▼ Age:
Known to Bite: (Y/N)	Demeanor: ▼	Microchip Id: Registration Tag #:
Tag Years: 0 Expires On: 📅		

Enter the **Name, Species, Breed,** and **Sex** of the animal.

Animal Name: **ACE**

Species: **DOG** ✕ ▼

Breed: **MIXED ROTTWEILER** ✕ ▼

Sex: **MALE** ✕ ▼

Add the **Weight, Height,** and **Size** of the animal.

Weight: **80** Height: **203**

Size: **MEDIUM** ✕ ▼

▼ Animal Codes

▶ Animal Names
▶ Species
▶ Breed
▶ Sex
▶ Size
▶ Color
▶ Coat
▶ Hair Length
▶ Ear Length
▶ Tail Length
▶ Age Class

Add more details about the animal, such as the **Color, Coat, Hair Length, Ear Length, Tail Length, Age Class,** and **Age.**

Color:		Coat:		Hair Length:	
BEIGE	✕ ▾	COAT	✕ ▾	M	✕ ▾

Ear Length:		Tail Length:		Age Class:		Age:
LONG	✕ ▾	SHORT	✕ ▾	ADULT	✕ ▾	5

If the animal had to be **Quarantined** after the incident, list that information here, including the **Date, Time, Site,** and **Release Date.**

	Quarantined Date:		Time:	Quarantined Site:	Quarantined Released:	
✔ Quarantined	12/01/2024	📅	00:00:00	MAIN SITE	12/06/2024	📅

If the animal was sterilized or had a rabies vaccination, list that information here as well.

Sterilized:	Rabies Vaccination Current:
Y	Y

Rabies Vacccination Date:	Rabies Tag Number:
10/03/2024 📅	12345

> ❗ Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.)

Vet Tab

Vet

The **Vet** tab lets you select a company / business as the animal's vet for record purposes. If you already have the organization in your records, simply type the name (such as **FRIENDLY VET**) and it will appear automatically. If you don't have the vet or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Animal Vet:

BLOUNT VET   SEARCH   EDIT   ADD

Address 1: 321 PATTON ST

Address 2:   **Apt/Suite #:**

City: MARYVILLE   **State:** TN   **Zip Code:** 37804

Phone: **Email:**

Latitude: 35.7577279   **Longitude:** -83.9698221

Maintain Files Codes

▼ **Animal Codes**

▶ Animal Vets

Notes Tab

The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.

Use **Add Note** to add a new note.

The **View Story** button will show all notes (except Narrative) that have been added on one page.

Images Tab

Images   A

The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.

DOWNLOAD ALL IMAGES   EXPORT GRID TO FILE   ADD IMAGE   ADD IMAGES

To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab

The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the ⬇ icon to download the attachment to the computer.

You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.

You can also **Download All PDFs** at once by clicking the appropriate button.

If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

Bite Incident Reports

iSOMS allows you to print different types of reports for incidents:

- ➢ **Incidents List Reports**
- ➢ **Detailed Reports**
- ➢ **Form Reports**
- ➢ **Custom Reports**

To access the reports, begin on the iSOMS home screen and navigate to:

Records → Back Office → Animal Control → Bite Incidents

Now click on the **Reports** button in the upper right corner.
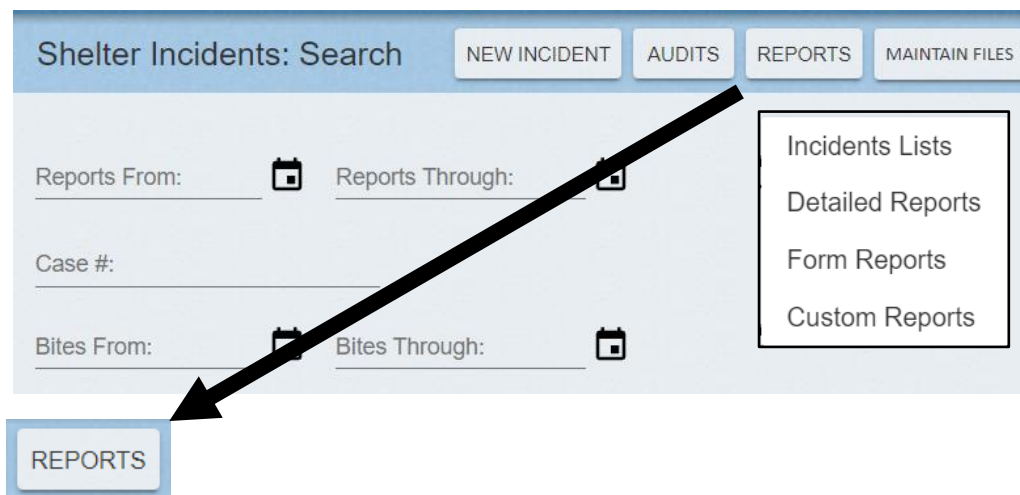
Incident Lists

Incident Lists reports a list of animal incident over a certain date range so you can quickly view the incidents that have occurred. *Report Style* has an option to create a standard list, a list grouped by victim type, or a list grouped by species.

Shelter Incidents: List Reports

Report Style
List

Date From: 01/01/2024   Date Through: 12/31/2024   Report By:

Victim Type: Disposition:

Species: Breed:

☐ All Agencies   ☐ Hide Notes

Set your parameters for the report and click **View** or **Download** to view the report.

YOUR AGENCY
Shelter Incidents List
Report Dates From 01/01/2024 Through 12/31/2024   Page 1 of 1

Report Date	Bite Date	Case Number	Bite Location	Victim Type
12/31/2024 15:09	12/01/2024 12:30	2024-0002	LF FOOT	ANIMAL

Owner Name: DOE, JAMES   Victim Name: ,
Species: DOG   Breed: MIXED ROTTWEILER
Common Name: THE MALL   Report By: ELDER, MARTIN
Address: Disposition Date:
CSZ: Disposition: CITATION ISSUED

Count: **1**

YOUR AGENCY
Shelter Incidents List (By Species)
Report Dates From 01/01/2024 Through 12/31/2024   Page 1 of 1

Species: DOG

Report Date	Bite Date	Case Number	Bite Location	Victim Type
12/31/2024 15:09	12/01/2024 12:30	2024-0002	LF FOOT	ANIMAL

Owner Name: DOE, JAMES   Victim Name: ,
Species: DOG   Breed: MIXED ROTTWEILER
Common Name: THE MALL   Report By: ELDER, MARTIN
Address: Disposition Date:
CSZ: Disposition: CITATION ISSUED

Details Report

Details Report goes over incidents in detail so you can view records in an information-complete report. You can also set it to a specific animal if you click the **Reports** button from that animal / incident record.

Set your parameters for the report and click **View** or **Download** to view the report.

Shelter Complaints / Calls

The **Shelter Complaints / Calls** module lets you keep track of calls and complaints to your agency for animal problems, especially calls concerning the animal shelter. To add or search for a shelter call, begin on the iSOMS home screen. Click on the following:

Records → Back Office → Animal Control → Complaints / Calls
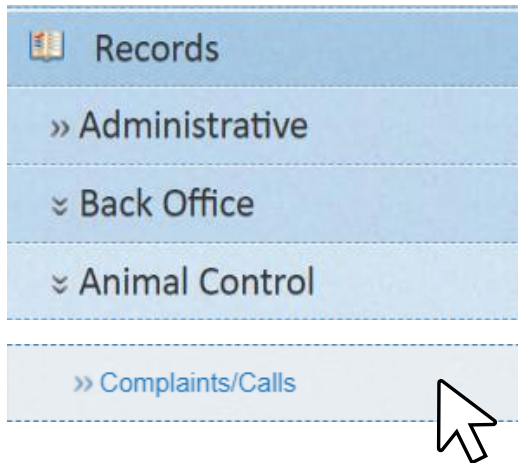
Searching for Shelter Complaint / Call Records

This will open the **Shelter Complaints / Calls Search** screen. Here you can look up current call records if you need to edit their record. To look up a record, type in the search filter fields and click on one of the **Lookup** buttons.

Important Lookup Fields

You can filter for **Complaint Type** or **Disposition** of the call or complaint.

> Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.)

After you do your search, you can double click on the entry or click on the pencil icon on the far right (✏) to open the screen to view, edit, or delete it.

Search Criteria ▶

Search Results

250 Records

Report Date	Case #	Citation #	Complaint Type	Owner Last Name
12/31/2024	2024-0001			
11/29/2018	20180001	1234	ANIMAL AT LARGE	OWNER
11/29/2018	20180002			
04/05/2017	20170001	NO TICKET	BARKING DOGS	ELDER
04/12/2015	2015-00100	1234	ANIMAL AT LARGE	LITTLE OLD MAN
11/13/2013				
05/24/2011	THE CASE	THE CIT2	BARKING DOGS	ADAMS

Adding Shelter Complaint / Call Records

In order to add a new complaint or call record, click on the **New Complaint** button on the search screen. Click **Yes** when prompted for confirmation.

Animal Control Module

Transferring to Shelter Complaint / Call Records

Shelter Complaint / Call Records can also be created by transferring information from the *Complaint Cards* module for CAD. If you have a Complaint Card you wish to transfer, navigate to it in the CAD section of iSOMS, and locate the Complaint Card you want to use to add an Animal Shelter Complaint / Call for.

Navigate to **COMMUNICATIONS** → **COMPLAINT CARDS**	Locate the entry you wish to transfer into a Shelter Call.

Then click **Transfer Card** and select *Shelter Complaint / Call* to copy this information to the desired module. Select the appropriate Case Number and hit **Transfer.**

Filling in Shelter Complaint/Call Fields

After confirming you want to add a new record, you will be brought to a screen where you can add information on the complaint you need to add.

IMPORTANT: Optional items will be listed in **blue**. You can skip these items if not needed, or if you don't know if you need them.

Report Date and Time will be automatically set to the current day and time. If the report date and time are not for today, you can change these here.

The **Case Number** will be automatically generated, but if you have your own system, you can change it here.

Add the **Date** the call or complaint was assigned and the name of the officer who the complaint was **Assigned To**. For the officer name, you can simply type in the box or search manually by using the magnifying glass. (See *Appendix B, Searching Officers* on page 194 if you want information on this.)

Animal Control Module

> Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.) Codes are listed along the right side for reference.

Add the **Complaint Type** for the type of complaint, such as an animal being at large, animal neglect, or barking dogs.

▼ **Animal Codes**

▶ Complaint Types

▶ Dispositions

Complaint Type:

ANIMAL AT LARGE   ×   ▼

If the result of the call or complaint is known, list the **Disposition** here, such as a bite report, trap left, or written notice. Also list the **Disposition Date.**

Disposition:

LIVESTOCK   ×   ▼

Disposition Date:

12/01/2024

You can list the **Number of Complaints**, if there were multiple complaints.

# of Complaints:

2

Add the **Arrial Date** and **Time** of the officer sent to the scene.

Arrive Date:

01/01/2025

Arrive Time:

06:40:00

If a citation was issued, you should check **Citation Issued** and add the **Citation Number**.

✔ Citation Issued

Citation Number:

12345

Animal Control Module

The next set of fields is for recording the relevant place where the animal was reported or encountered. **Common Name** is the common or business name of the place, such as the mall or "The Green", for example. **Subdivision / Area / Building Complex** and **Zone** offers options of places where the animal was found. These are determined by your agency.

Enter the address fields for the location where the animal was found or the incident occurred, if possible.

Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

Save *is located at the top of the screen.*

Now that you have filled out the fields, you can use the tabs below the fields to record additional information on the item. See the *Tabs* section for more information.

Shelter Complaint / Call Tabs

Summary

Fill out the tabs below the fields for shelter complaint / calls as needed. The **Reported By** tab lists information about the person who called and/or complained. The **Owner** tab is for listing information on the owner of the animal. **Department** keeps information concerning the related department, and the **Animal** tab is for the animal's name, description, etc.

Notes, Images, and **Attachments** tabs are available if you need to take additional notes or upload images and documents. (Notes, Images, and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)

Reported By	Owner	Department	Animal

Notes	Images	Attachments

Reported By and Owner Tabs

Reported By

Owner

The **Reported By** and **Owner** tabs lists identifying information about the animal's owner and the person who reported the animal.

SEARCH PEOPLE	Linked to Master Name			
Last Name: DOE	First Name: JAMES	Middle Name: RANDAL	Jr/Sr:	Home Phone: (865)-111-1111	Cell Phone:	Email:
House #: 1142	Direction:	Street: OXFORD HILLS	Apt/Lot #:	City: MARYVILLE	State: TN	ZipCode:
Race: WHITE	Sex: MALE	DOB: 01/01/1965	DL State: TN	Driver License #: 123456789	Restrictions:

It is convenient if you have someone's Master Name information to use the **Search People** button. This will link to a Master Name and get the information filled in quickly. If not, simply add the information here by filling in information manually.

SEARCH PEOPLE   Linked to Master Name

Quick Fill from Master Names

If you already have information on someone as a Master Name, then you can add it quickly by clicking the **Search People** button in the upper left.

SEARCH PEOPLE

This will open the Search Persons. Input a name and other identifying info (such as DL number or SSN, etc.), then click **Lookup.**

Select the person from the list to add them by double-clicking or using the *check icon* (✓). This will autofill information you have on them.

Department Tab

The **Department** tab lets you select a department relevant to the animal, such as the one keeping or handling the animal. If you already have the department in your records, simply type the name (such as **DEPARTMENT FOR SHELTER ANIMALS**) and it will appear automatically. If you don't have the department in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Animal Tab

Animal

The **Animal** tab lists information about the animal that was reported / complained about. Fill out known information and additional information can be added later if needed.

Animal Name: Species: ▼   Breed: ▼

Sex: ▼   Weight: 0   Height: 0   Size: ▼

Color: ▼   Coat: ▼   Hair Length: ▼

Ear Length: ▼   Tail Length: ▼   Age Class: ▼   Age:

Enter the **Name, Species, Breed,** and **Sex** of the animal.

Animal Name:
ACE

Species:
DOG   ✕   ▼

Breed:
MIXED ROTTWEILER   ✕   ▼

Sex:
MALE   ✕   ▼

▼ **Animal Codes**

▶ Animal Names
▶ Species
▶ Breed
▶ Sex
▶ Size
▶ Color
▶ Coat
▶ Hair Length
▶ Ear Length
▶ Tail Length
▶ Age Class

Add the **Weight, Height,** and **Size** of the animal.

Weight: 80   Height: 203

Size:
MEDIUM   ✕   ▼

Add any other known details about the animal, such as the **Color, Coat, Hair Length, Ear Length, Tail Length, Age Class,** and **Age.**

Color:
BEIGE   ✕   ▼

Coat:
COAT   ✕   ▼

Hair Length:
M   ✕   ▼

Ear Length:
LONG   ✕   ▼

Tail Length:
SHORT   ✕   ▼

Age Class:
ADULT   ✕   ▼

Age:
5

Notes Tab

The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.

Use **Add Note** to add a new note.

The **View Story** button will show all notes (except Narrative) that have been added on one page.

Images Tab

Images	A...

The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.

DOWNLOAD ALL IMAGES	EXPORT GRID TO FILE	ADD IMAGE	ADD IMAGES

To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab

Attachments

The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the ⬇ icon to download the attachment to the computer.
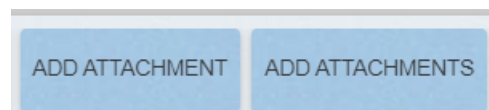

You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.

You can also **Download All PDFs** at once by clicking the appropriate button.

DOWNLOAD ALL PDFS

File name:	files.pdf
Save as type:	PDF File (*.pdf)

If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

SCAN

Scan Attachment

ISOMS Windows App Must Be Running

File Name: _____   Report Date: 📅

Category: ▼   Sub-Category: ▼
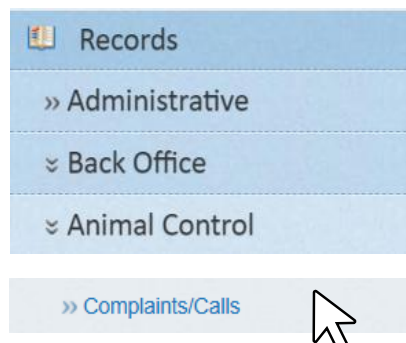
Description:

CANCEL   SCAN DUPLEX   SCAN AUTO

Shelter Complaints/Call Reports

iSOMS allows you to print different types of reports for *Shelter Complaints / Calls*:

- ➤ **Complaint Lists**
- ➤ **Complaint Details**

- ➤ **Form Reports**
- ➤ **Custom Reports**

To access the reports, begin on the iSOMS home screen and navigate to:

Records → Back Office → Animal Control → Complaints/Calls

Now click on the **Reports** button in the upper right corner.

Complaint Lists

Complaint Lists reports a list of shelter complaints and calls over a certain date range so you can quickly view the calls that have been recorded. *Report Style* has an option to create a standard list, a list grouped by complaint type, or a list grouped by disposition of the call.

Set your parameters for the report and click **View** or **Download** to view the report.

Complaint Details Report

Complaint Details Report goes over complaints in detail so you can view records in an information-complete report. You can also set it to a specific record if you click the **Reports** button from that record.

Shelter Complaints/Calls: Detailed Reports

Records to Include:

◉ All   ○ No Shelter Complaint Selected

Reports From:
01/24/2025

Reports Through:
01/24/2025

Report By:

☐ All Agencies

☐ Hide Notes   ☐ Hide Images   ☐ Hide Attachments

Report Format:

◉ PDF   ○ Excel   ○ XML   ○ SQL

VIEW   DOWNLOAD   EMAIL   CLEAR FILTER

Set your parameters for the report and click **View** or **Download** to view the report.

YOUR AGENCY
Shelter Complaint Details
Report Dates From 12/01/2024 Through 01/24/2025   Page   1   of   3

Shelter Complaint Details

Report Date:	12/31/2024	Case Number:	2024-0001
Assigned To:		Assigned Date:	
Department:		Complaint Type:	
Disposition:		Disposition Date:	
Complaint Count:	1	Arrive Date:	
Citation Issued:	NO	Citation Number:	

Incident Information:

|		
Common Name:		
Address:	Apartment:	
CSZ:	Lat/Lon:	
SubDivision:	Zone:	

Shelter Donations

The **Donations** module lets you keep track of donations (money or otherwise) to your animal shelter. You can track how much was given, what was given, and who gave it. You can also run a list report to get an overview of donations or a stats report to see giving numbers.

To add or search for a donation record, begin on the iSOMS home screen. Click on the following:

Records → Back Office → Animal Control → Donations
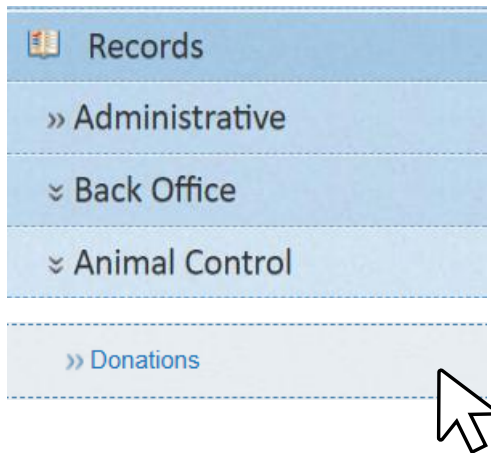
Searching for Shelter Donations

This will open the **Shelter Donations Search** screen. Here you can look up current donation records if you need to edit their record. To look up a record, type in the search filter fields and click on one of the **Lookup** buttons.

Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.)

Important Lookup Fields

Narrative Keyword lets you quickly find records with a specific word in the narrative. This can be useful when looking for a specific donation record.

Donation Type lets you sort by money, food, or other donations. You can also search for a specific donor as well in the **Donor** field.

After you do your search, you can double click on the entry or click on the pencil icon on the far right (✎) to open the screen to view, edit, or delete it.
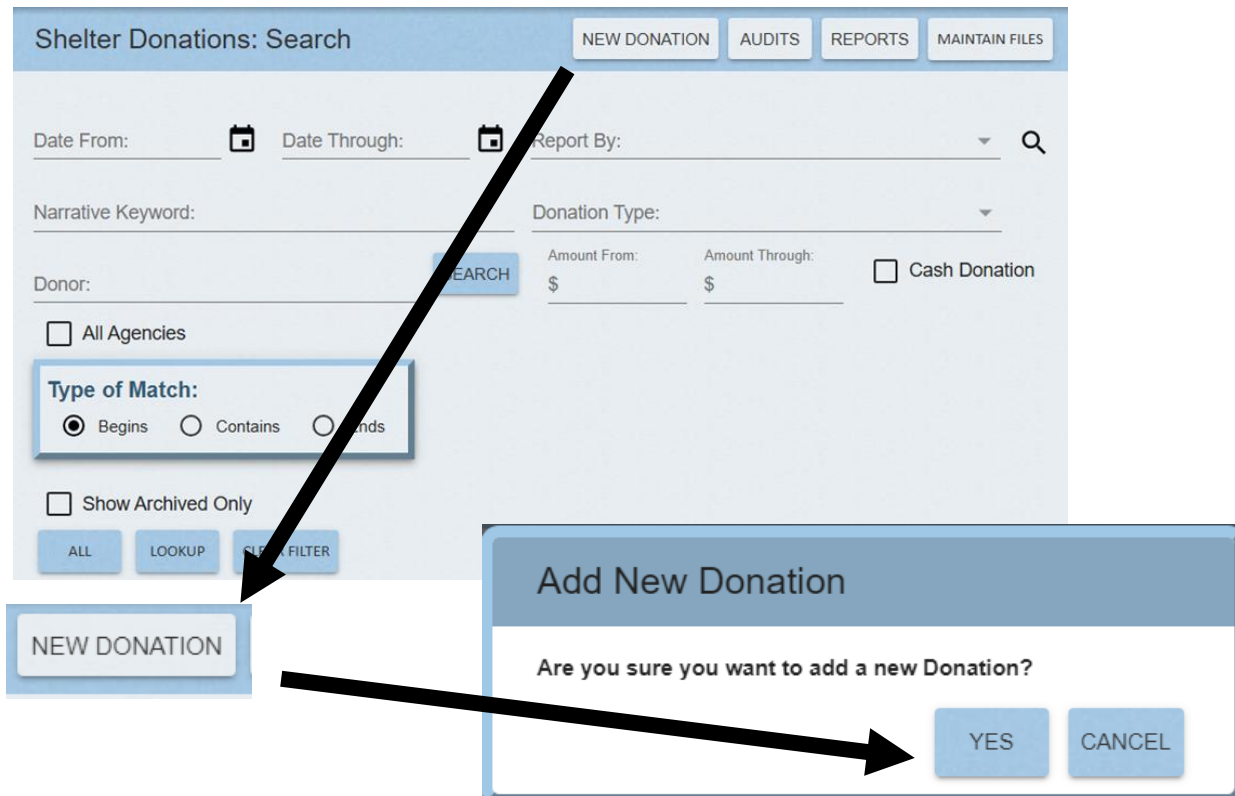

Adding Shelter Donation Records

In order to add a new donation record, click on the **New Donation** button on the search screen. Click **Yes** when prompted for confirmation.

After confirming you want to add a new record, you will be brought to a screen where you can add information on the donation you need to add.

Report Date and Time will be automatically set to the current day and time. If the report date and time are not for today, you can change these here.

Add the name of the officer who is writing the report in **Report By**. For the officer name, you can simply type in the box or search manually by using the magnifying glass. (See *Appendix B, Searching Officers* on page 194 if you want information on this.) By default, this will be filled with your name in iSOMS, so only change it if necessary.

Some of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.) Codes are listed on the right of the page for easy reference.

Add the **Donation Type** for the type of complaint, such as a food, monetary, or other type of donation, and then add the **Donation Amount** if it is money. Check the **Cash Donation** box if cash was received.

Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

> ***Save** is located at the top of the screen.*

Now that you have filled out the fields, you can use the tabs below the fields to record additional information on the item. See the *Tabs* section for more information.

Shelter Donation Tabs

Summary

Fill out the tabs below the fields for shelter donation records as needed. The **Donor** tab is for details related to the person, business, or organization which donated to your shelter.

Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents. (Notes, Images, and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)
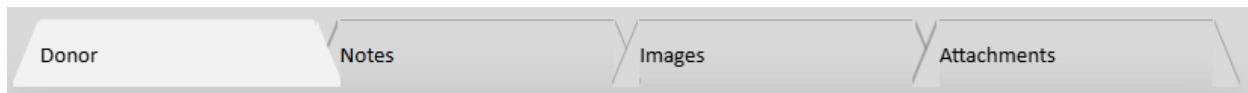
Donor Tab
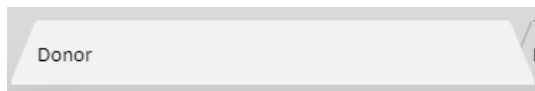
The **Donor** tab lets you select a person / business / organization as the donor for record purposes. Make sure to add the **Donation Date** for when the donation was received.

 If you already have the donor in your records, simply type the name (such as **MONEY GIVERS INC**) and it will appear automatically. If you don't have the donor in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Notes Tab

The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.

Use **Add Note** to add a new note.

The **View Story** button will show all notes (except Narrative) that have been added on one page.

Images Tab

Images	A

The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.

DOWNLOAD ALL IMAGES EXPORT GRID TO FILE ADD IMAGE ADD IMAGES

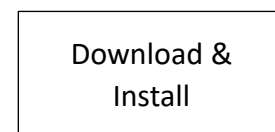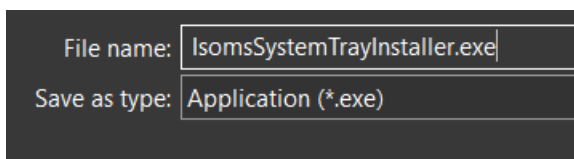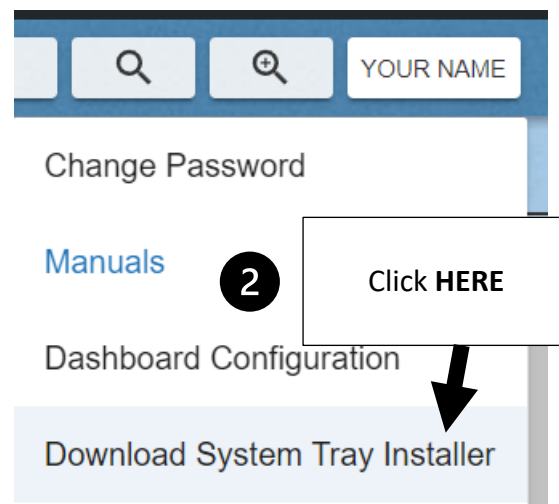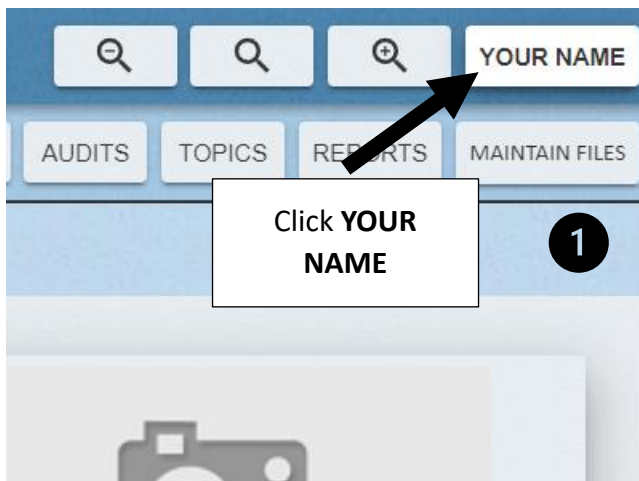To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.
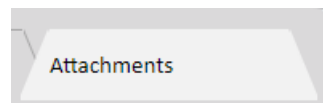
After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.
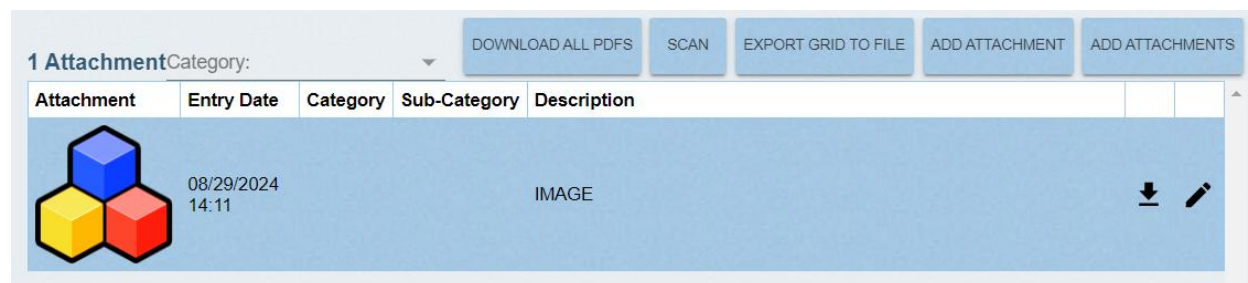
Attachments Tab

The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the ⬇ icon to download the attachment to the computer.

You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.

You can also **Download All PDFs** at once by clicking the appropriate button.

If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

Donation Reports

iSOMS allows you to print different types of reports for *Shelter Donations:*

- ➤ **Donation Lists**
- ➤ **Donation Stats**
- ➤ **Form Reports**
- ➤ **Custom Reports**

To access the reports, begin on the iSOMS home screen and navigate to:

Records → Back Office → Animal Control → Donations
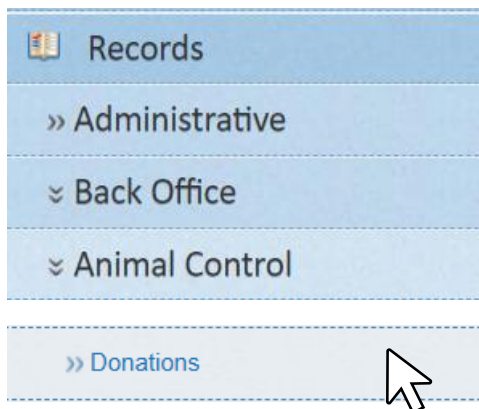
Now click on the **Reports** button in the upper right corner.
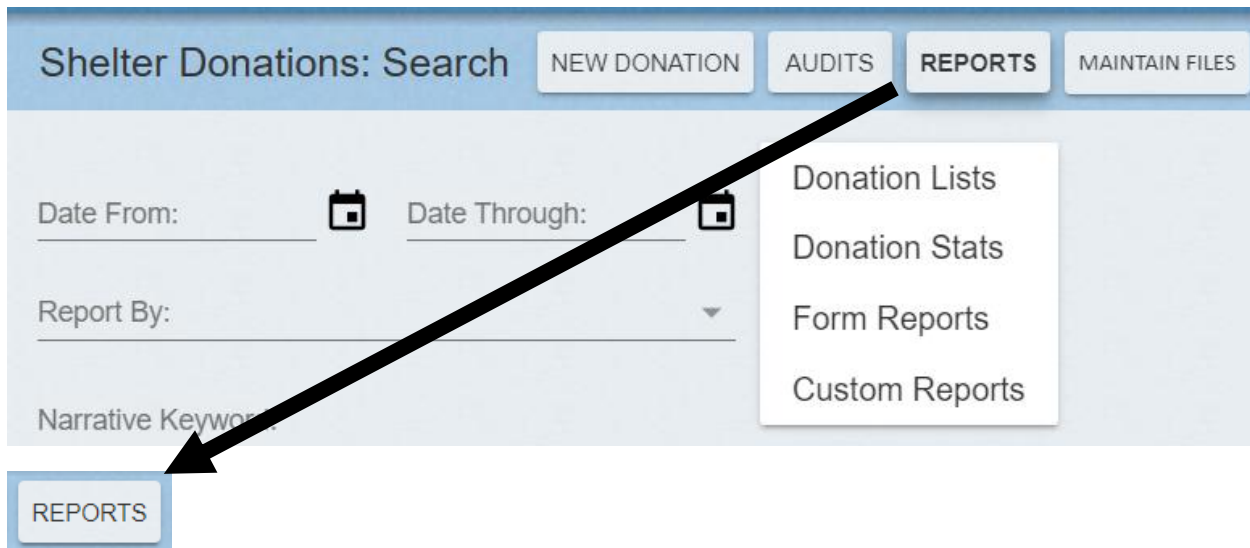
Donation Lists

Donation Lists reports a list of shelter donations over a certain date range so you can quickly view donation records. *Report Style* has an option to create a standard list, a list grouped by donation type, grouped by donor, or grouped by city.

Set your parameters for the report and click **View** or **Download** to view the report.

Donation Stats

Donation Stats report will list information on donations by donation type or by donor. Make sure to add at a date range in **Date From** and **Date Through** and choose **Report Style** as either donation type or by donor. Click **View** or **Download** to view the report.

Set your parameters for the report and click **View** or **Download** to view the report.

Shelter Lost / Found

The **Lost and Found** module lets you keep track of lost and found records for your animal shelter. You can transfer CAD Complaint Cards into Lost and Found Records, add info on the contact who reported the missing or found animal, and run reports on the animals listed in the module.

To add or search for a lost and found record, begin on the iSOMS home screen. Click on the following:

Records → Back Office → Animal Control → Lost and Found
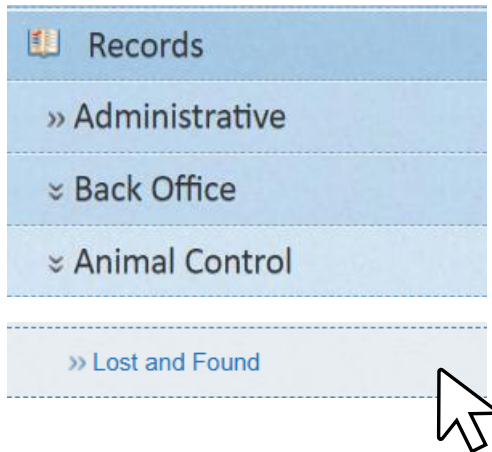
Searching for Lost and Found Records

This will open the **Shelter Lost and Found: Search** screen. Here you can look up current lost and found records if you need to edit their record. To look up a record, type in the search filter fields and click on one of the **Lookup** buttons.

ALL ACTIVE

Use the **ALL ACTIVE** button to quickly see active records.

Add search requirements

Scroll down and click **Lookup**

Important Lookup Fields

Narrative Keyword:

Narrative Keyword lets you quickly find records with a specific word in the narrative. This can be useful when looking for a specific record.

Different animal descriptors let you search by animal type or description.
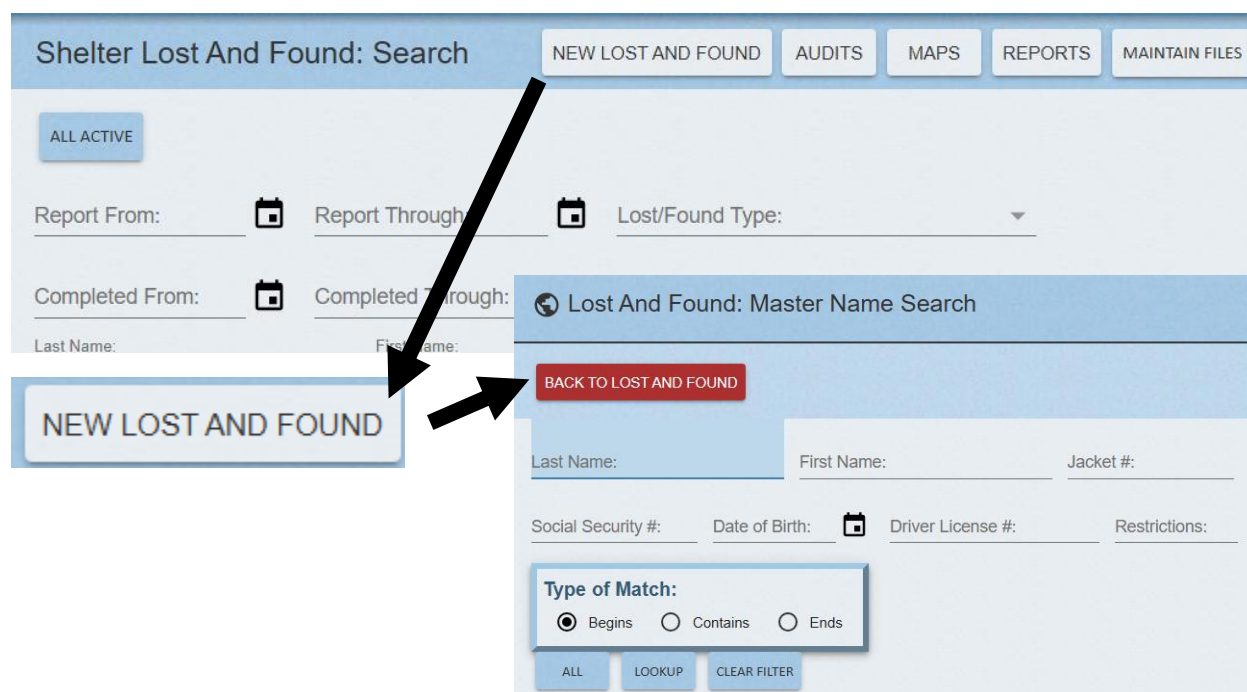
After you do your search, you can double click on the entry or click on the pencil icon on the far right (✏️) to open the screen to view, edit, or delete it.

Adding Lost and Found Records

In order to add a new Lost and Found record, click on the **New Lost and Found** button on the search screen. This will open the Master Name search, where you will pick a person to associate this animal with.

This will bring you to the **Lost And Found: Master Name Search** screen.

This screen allows you to either find someone's name in the Master Name records or enter a new name. You need to use an existing Master Name or create a new Master Name if you want to create a new lost and found record. This will allow you to use information already present in iSOMS and link your lost and found record directly to the Master Name and jacket number.

If the animal owner / person related / etc. already has a Master Name in iSOMS, you can enter information to narrow the search and click "**Lookup.**" Clicking **"All"** will show all Master Names in your system. If you are searching for a Master Name, once you enter any information to narrow the search and click "**Lookup,**" the next screen will show any results that matched your search, and you can choose the Master Name by clicking on it twice.

Search Criteria ▶

Search Results

4 Records

	Image	Agency	Last Name	First Name	Middle Name	Post Name	DOB	Race	Sex	SSN	DLN	Jacket #
✏	NO PHOTO	Shared	DOE	JAMES								33613
✏		Shared	DOE	JAMES								33614
✏		Shared	DOE	JAMES	RANDAL		01/01/1965	WHITE	MALE	123-45-6789		82614

If the person has no Master Name in the database, you need to create a new one by clicking **"New Master Name"** in the upper right. (See **Creating a New Master Name** in the iSOMS *Corrections Manual* for more information if you need it.)

Once you double click the row with the correct name, the Master Name will appear and fill in information for you. Click **"Save & Create Lost and Found Record"** at the top of the screen to begin the Lost and Found record.

If you have not entered much information yet, you will get a data entry warning. But this will not happen if the Master Name has been sufficiently filled in before. In any case, the Master Name will fill in as the contact information on the newly created Lost and Found Record.

Animal Control Module

Transferring to Shelter Lost and Found

Shelter Lost and Found Records can also be created by transferring information from the *Complaint Cards* module for CAD. If you have a Complaint Card you wish to transfer, navigate to it in the CAD section of iSOMS, and locate the Complaint Card you want to use to add a Shelter Lost and Found record for.

Navigate to **COMMUNICATIONS** → **COMPLAINT CARDS**	Locate the entry you wish to transfer into a Shelter Call.

Then click **Transfer Card** and select *Shelter Lost / Found* to copy this information to the desired module. Select the appropriate Case Number and hit **Transfer.**

Animal Control Module

Filling in Shelter Lost and Found Fields

After confirming you want to add a new record, you will be brought to a screen where you can add information on the record you need to add.

IMPORTANT: Optional items will be listed in **blue**. You can skip these items if not needed, or if you don't know if you need them.

Report Date and Time will be automatically set to the current day and time. If the report date and time are not for today, you can change these here.

The **Case Number** will be automatically generated, but if you have your own system, you can change it here.

Some of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.) Codes are listed on the right of the page for easy reference.

Add the **Lost and Found Type** to tell whether the animal is lost, found, or missing.

Lost/Found Type:
LOST

▼ **Lost And Found Codes**

▶ Lost/Found Types
▶ Dispositions

If the disposition of the lost/found situation is known, list the **Disposition** here, such as "found", "returned home", or "stopped looking". Also list the **Completed Date** and **Time.**

Disposition:
STOPPED LOOKING

Completed Date: Time:
02/08/2025   00:00:00

If this record should be hidden from public view, check **Exclude from Website.**

✔ Exclude From Website

If this record is linked to call (such as being transferred from CAD), you can click **View Call** to open the record in iSOMS**.**

VIEW CALL

The next set of fields is for recording the relevant place where the animal was reported or encountered. **Common Name** is the common or business name of the place, such as the mall or "The Green", for example. **Subdivision / Area / Building Complex** and **Zone** offers options of places where the animal was found. These are determined by your agency.

Common Name:
The Mall

Subdivision/Area/Building Complex:
DOE

Zone:
0101 101 ZONE 1

▼ **Table Codes**

▶ SubDivisions
▶ Zones

Animal Control Module

Enter the address fields for the location where the animal was found or the incident occurred, if possible.

House #:	Direction:	Street:	Apt/Lot #:
6564		Clinton Highway	

City:	State:	ZipCode:
KNOXVILLE	TN	37912

Enter the **Name, Species, Breed,** and **Sex** of the animal.

Animal Name: ACE
Species: DOG

Breed: MIXED ROTTWEILER

Sex: MALE

▼ **Animal Codes**

▶ Animal Names
▶ Species
▶ Breed
▶ Sex
▶ Size
▶ Color
▶ Coat
▶ Hair Length
▶ Ear Length
▶ Tail Length
▶ Age Class

Add the **Weight, Height,** and **Size** of the animal.

Weight: 80
Height: 203

Size: MEDIUM

Add more details about the animal, such as the **Color, Coat, Hair Length, Ear Length, Tail Length, Age Class,** and **Age.**

Color:	Coat:	Hair Length:
BEIGE	COAT	M

Ear Length:	Tail Length:	Age Class:	Age:
LONG	SHORT	ADULT	5

If the animal has a microchip or reg. tag #, you can add those here.

Registration Tag #: 12345
Microchip Id #: 67890

If the animal has a distinctive feature, add that in **Tattoo/Feature.**

Tattoo/Feature:
NONE

If the animal is **sterilized** or **dangerous**, add that info here.

Sterilized: Dangerous:
Y   N

If you would like to add an image of the animal, you can click **Upload Image (☁) or Take New Photo (📷)** on the right. Select or take the image and it will be added.

Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

Save is located at the top of the screen.	SAVE DELETE

Now that you have filled out the fields, you can use the tabs below the fields to record additional information on the item. See the *Tabs* section for more information.

Shelter Lost and Found Tabs

Summary

Fill out the tabs below the fields for shelter lost and found records as needed. The **Contact** tab records the person who contacted your agency about the lost or found animal. The Contact tab will probably be filled out when you chose a Master Name, but if not, you should fill it out when you create the entry. The **Department** tab lists the relevant department to this animal.

Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents. (Notes, Images, and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)

Contact	Department	Notes	Images	Attachments

Contact Tab

Contact

The **Contact** tab lists identifying information about the person related to the lost/found animal. You should fill out as much of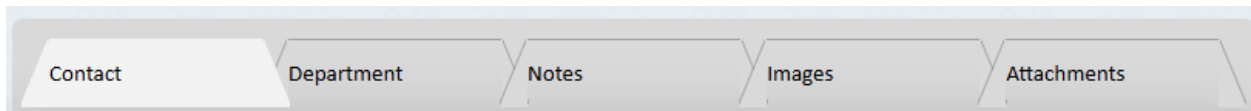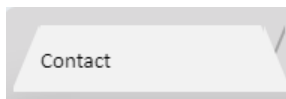 this tab as possible on every *Lost and Found* record. The contact tab will usually be filled out via the Master Name you used when you created the record, but if not, fill in info here.

Last Name:	First Name:	Middle Name:	
DOE	JAMES	RANDAL	Jr/Sr:

House #:		Street:		
1142	Direction:	OXFORD HILLS		Apt/Lot #:

City:	State:	ZipCode:
MARYVILLE	TN	37912

Home Phone:	Cell Phone:	Work Phone:	Email:
(865)-111-1111			fakeemail@fakewebsite.com

Text:
865-555-6789

Department Tab

Department	

The **Department** tab lets you select a department relevant to the animal, such as the one keeping or handling the animal. If you already have the department in your records, simply type the name (such as **DEPARTMENT FOR SHELTER ANIMALS**) and it will appear automatically. If you don't have the department in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Department:

ALCOA

SEARCH   EDIT   ADD

Address 1: 123 FAKE ST

Address 2:   **Apt/Suite #:**

City: ALCOA   **State:** TN   **Zip Code:** 37912

Phone: (865) 555-1234   **Email:** EMAIL@WEBSITE.COM

Latitude: 36.0091467   **Longitude:** -83.9797173

Maintain Files Codes

▼ **Business Codes**

▶ Shelter Departments

Notes Tab

The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.

Use **Add Note** to add a new note.

The **View Story** button will show all notes (except Narrative) that have been added on one page.

Images Tab

The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.

To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab

Attachments

The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the ⬇ icon to download the attachment to the computer.

You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.

View Attachment Information

File Name:
Trig.pdf

Report Date:
07/05/2024

Category:
CITATION

Sub-Category:
TEXT FILES

Description:

SAVE   EXIT

You can also **Download All PDFs** at once by clicking the appropriate button.

If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

Animal Control Module

Lost and Found Reports

iSOMS allows you to print different types of reports for *Shelter Lost and Found:*

- **Lost and Found Lists**
- **Form Reports**
- **Custom Reports**

To access the reports, begin on the iSOMS home screen and navigate to:

Records → Back Office → Animal Control → Lost and Found
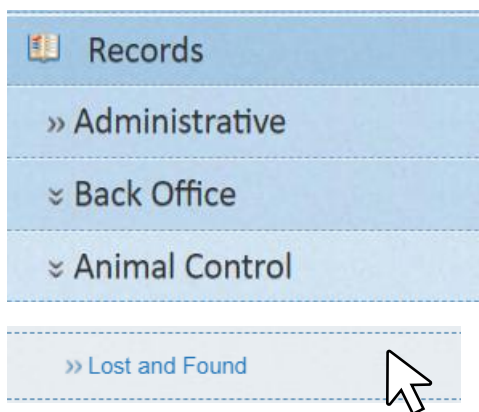
Now click on the **Reports** button in the upper right corner.
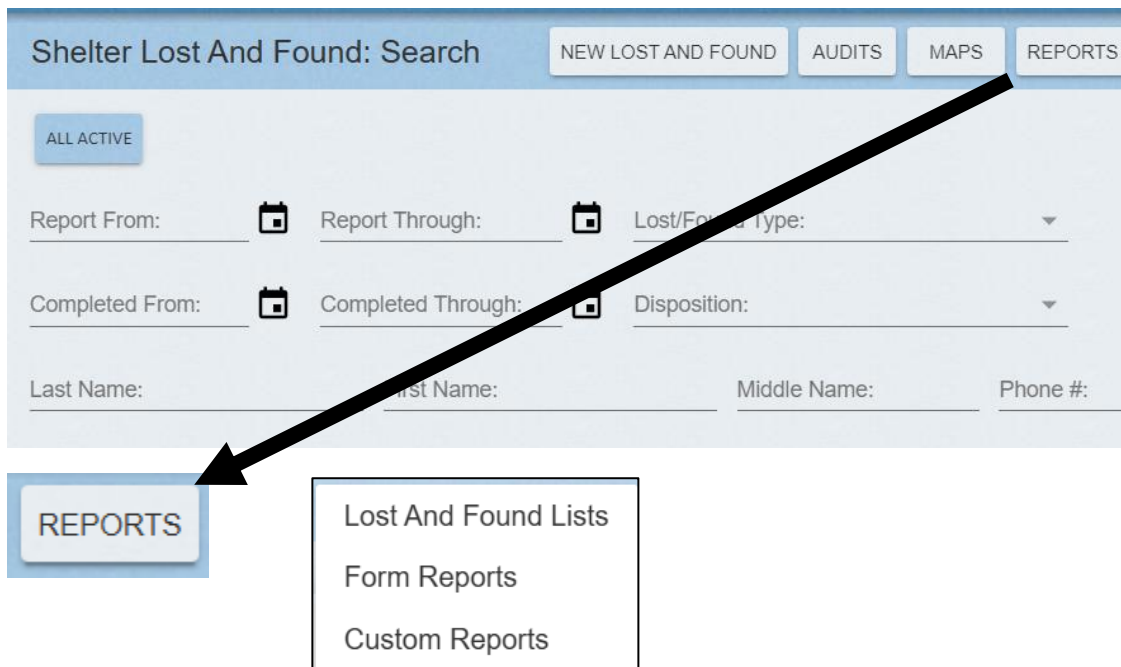
Animal Control Module

Lost and Found Lists

Lost and Found Lists reports a list of shelter lost and found records over a certain date range so you can quickly view or print records. *Report Style* has an option to create a standard list, a list grouped by species, grouped by city, or grouped by lost and found type

Set your parameters for the report and click **View** or **Download** to view the report.

Shelter Euthanizations

iSOMS lets you use the **Euthanizations** module to keep track of euthanizations and/or tranquilizations of animals. You can add where the animal was discovered, note the drug(s) used to euthanize or tranquilize the animal, run reports related to your records, and more.

To add or search for an euthanization record, begin on the iSOMS home screen.
Click on the following:

Records → Back Office → Animal Control → Euthanizations
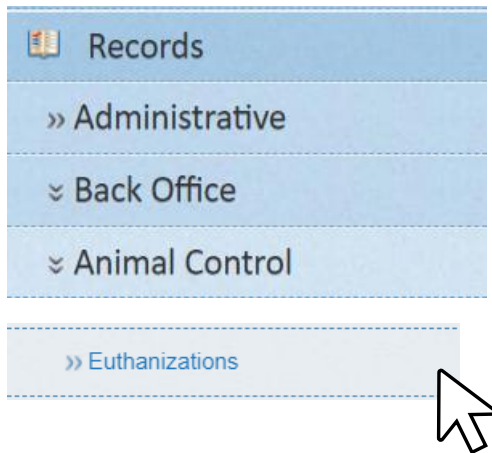
Searching for Shelter Euthanization Records

This will open the **Shelter Euthanizations: Search** screen. Here you can look up current euthanization records if you need to view or edit their record. To look up a record, type in the search filter fields and click on one of the **Lookup** buttons.

After you do your search, you can double click on the entry or click on the pencil icon on the far right (✏) to open the screen to view, edit, or delete it.

Euthanized Date	Euthanized Reason	Case Number	Address	Species	Breed	Euthanized In Field	
02/03/2025		2025-0001				Yes	✏
05/24/2017	WILDLIFE	201700001-1				No	✏
04/27/2017	WILDLIFE	TICKET2			BOXER	Yes	✏

Search Criteria ▶
Search Results
250 Records   EXPORT GRID TO FILE   VIEW ALL AGENCIES

Adding Shelter Euthanization Records

In order to add a new euthanization record, click on the **New Euthanization** button on the search screen. Click **Yes** when prompted for confirmation.

After confirming you want to add a new record, you will be brought to a screen where you can add information on the euthanization record you need to add.

Euthanize Date and Time will be automatically set to the current day and time. If the euthanization date and time are not for today, you can change these here.

The **Case Number** will be automatically generated, but if you have your own system, you can change it here.

Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.) Codes are listed along the right of the page for easy reference.

Euthanization Reason is for recording the reason for the euthanization, such as *Danger to People, Wildlife, Vehicle Accident,* or *Other.* **Euthanized in Field** will automatically be checked, but if the animal was euthanzied elsewhere, you can uncheck this box**.**

▼ Euthanization Codes

▶ Euthanization Reasons

Euthanization Reason:
WILDLIFE ✕ ▼

✔ Euthanized In Field

Now you can list what drug was used on the animal (**Euthanization Drug Type** or **Tranquilization Drug Type**), how much of a given drug was administered (**Drug Amount**), and who performed the administration of the drug. When listing the officer in **Euthanized By** or **Tranquilized By**, you can simply type in the box or search manually by using the magnifying glass. (See *Appendix B, Searching Officers* on page 194 if you want information on this.) By default, **Euthanized By** will be filled with your name in iSOMS, so only change it if necessary.

Euthanization Drug Type:	Drug Amount:	Euthanized By:
QUITE FATAL ✕ ▼	200	603 ELDER, MARTIN WILLIAM -INV ✕ ▼ 🔍
Tranquilation Drug Type:	Drug Amount:	Tranquilized By:
EASY SLEEP ✕ ▼	100	603 ELDER, MARTIN WILLIAM -INV ✕ ▼ 🔍

The next set of fields is for recording the place where the animal was encountered / euthanized by your agency / department. **Common Name** is the common or business name of the place, such as the mall or "The Green", for example. **Subdivision / Area / Building Complex** and **Zone** offers options of places where the animal was found. These are determined by your agency.

Common Name:
The Mall

Subdivision/Area/Building Complex:
DOE ✕ ▼

Zone:
0101 101 ZONE 1 ✕ ▼

▼ Agency Codes

▶ SubDivisions
▶ Zones

Enter the address fields for the location where the animal was found, if any. Sometimes this won't be applicable if the animal euthanized was already at a shelter, for example.

	House #:	Direction:	Street:	Apt/Lot #:	City:	State:
Pickup Address:	1110		Merchant Dr		KNOXVILLE	TN ✕ ▼

ZipCode:
37912 📍

Latitude:	Longitude:	
36.00317781	-83.98270133	🔍

Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

Save *is located at the top of the screen.*

Now that you have filled out the fields, you can use the tabs below the fields to record additional information on the item. See the *Tabs* section for more information.

Shelter Euthanization Tabs

Summary

Fill out the tabs below the fields for shelter euthanization records as needed. Both the **Animal** and **Department** tabs should be filled out when you create the entry. The **Animal** tab records information about the animal. The **Others Involved** tab records information on other people involved with this event. The **Department** tab tells what department or agency euthanized/tranquilized the animal.

Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents. (Notes, Images, and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)

Animal	Department	Others Involved	Notes	Images	Attachments
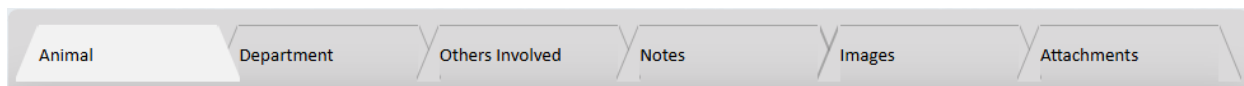
Animal Tab

Animal

The **Animal** tab lists information about the animal that was euthanized or tranquilized. You should fill out as much of this tab as possible.

Animal	Department		Notes		Images		Attachments

Species:
DOG   ✕   ▾

Breed:
GREAT DANE   ✕   ▾

Sex: Weight: Height: Size:
MALE   100   205   MEDIUM

Color: Coat: Hair Length: Ear Length:
BROWN   SMOOTH   MEDIUM   MEDIUM

Tail Length: Age Class: Age:
LONG   OLD   9

Enter the **Species, Breed,** and **Sex** of the animal.

Species:
DOG   ✕   ▾

Sex:
MALE   ✕   ▾

Breed:
MIXED ROTTWEILER

Add the **Weight, Height,** and **Size** of the animal.

Weight:
80

Height:
203

Size:
MEDIUM

▼ Animal Codes

▶ Species
▶ Breed
▶ Sex
▶ Size
▶ Color
▶ Coat
▶ Hair Length
▶ Ear Length
▶ Tail Length
▶ Age Class

Add more details about the animal, such as the **Color, Coat, Hair Length, Ear Length, Tail Length, Age Class,** and **Age.**

Color:
BEIGE

Coat:
COAT

Hair Length:
M

Ear Length:
LONG

Tail Length:
SHORT

Age Class:
ADULT

Age:
5

Department Tab

Department	F

The **Department** tab lets you select a department relevant to the animal, such as the one keeping or handling the animal. If you already have the department in your records, simply type the name (such as **DEPARTMENT FOR SHELTER ANIMALS**) and it will appear automatically. If you don't have the department in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Department:
ALCOA

[SEARCH] [EDIT] [ADD]

Address 1: 123 FAKE ST

Address 2:   **Apt/Suite #:**

City: ALCOA   **State:** TN   **Zip Code:** 37912

Phone: (865) 555-1234   **Email:** EMAIL@WEBSITE.COM

Latitude: 36.0091467   **Longitude:** -83.9797173 📍

Maintain Files Codes   ❗

▼ **Table Codes**
▶ Departments

Others Involved Tab

Others Involved | A

The **Others Involved** tab lets you record any other individuals that were involved in an incident and details relevant to the incident. To view, edit, or delete a current entry, double-click an entry from the table.

When you add a new entry, you should fill out only the tabs you need to fill out to track information and then save it. Details are provided for each of the sub-tabs below, although each sub-tab is relatively intuitive. Add information as needed.

EXPORT GRID TO FILE | ADD PERSON

1 Person

	Entry Date	How Involved	Relationship	Last Name	First Name	Middle	Post Name	DOB	Age	Home Phone
✏️	12/31/2024			DOE	JANE	F		05/15/1995	29	

In order to add a new entry, click the **Add Person** button. Confirm you want to add a new person involved, and then you will see the options to fill in the fields.

ADD PERSON

View Others Involved

SEARCH PEOPLE | How Involved: | Relationship: | SCAN DL

CHECK NCIC

☐ Hide Name on Report ☐ Hide Details on Report ☐ Safety Restraints Used

Last Name: **DOE**
First Name: **JAMES**
Middle Name: **RANDAL**
Jr/Sr:

Nickname/AKA:

House #: **1142** Direction: Street: **OXFORD HILLS** Apt/Lot #: City: **MARYVILLE**

State: **TN** ☒ ZipCode: 📍 County:

Home Phone: **(865)-111-1111** Cell Phone: Work Phone: Email:

📷 NO PHOTO

Image #: 0 of 0

< ☰ ☁ 📷 🔍 >

Biographical | Employer | Juvenile / Child Info

The fields at the top list the person's involvement and relationship to the people involved. Then identifying fields are below, along with additional headers to add extra info such as *Biographical, Employer,* and *Juvenile / Child Info*. For details, see below.

Quick Fill from Master Names

If you already have information on someone as a Master Name, then you can add it quickly by clicking the **Search People** button in the upper left.

SEARCH PEOPLE

This will open the Master Name search screen. Input a name and other identifying info (such as DL number or SSN, etc.), then click **Lookup.**

Select the person from the list to add them, and then click **Save and Select** in the *Others Involved* tab. This will autofill information you have on them.

Filling in Information

How Involved:
PROPERTY OWNER   ✕ ▾   Relationship: SCAN DL

First, fill in **How Involved** dropdown with how the person is connected to the incident.

How Involved:
PROPERTY OWNER   ✕ ▾

Add the **Relationship** this person has to the other people involved.

Relationship:
BROTHER

Now you can scan the person's driver license if you click **Scan DL**.

SCAN DL

☐ Hide Name on Report   ☐ Hide Details on Report   ☐ Safety Restraints Used

If you need to hide this name or details about the report, check **Hide Name** or **Hide Details**.

If the person had to be restrained, check **Safety Restraints Used.**

Now fill out the information about the person if necessary:

Last Name:
DOE   First Name: JAMES   Middle Name: Jr/Sr: ▾

Nickname/AKA:

House #: 123   Direction: Street: MADE UP ST   Apt/Lot #:   City: MURFREESBORO

State: TN ✕ ▾   ZipCode: 55555 📍 County: RUTHERFORD

Home Phone: (865)-555-6789   Cell Phone: Work Phone: Email: email@email.com

Headings

Below the main fields, the headings are available to type additional information about the person.

Fill in the biographical information under this heading, including SS and DL numbers.

Here you can add an employer record. The Employer system works by storing records of employers. This makes it so that you do not have to continuously re-enter the same information on the same business. See *Appendix C, Business Records* on page 195 for more information.

Animal Control Module

Juvenile / Child Info

Here you can fill out information on the individual if they were a juvenile / child.

Social Security #:	Date of Birth:		Person Type(forms):			Level Of Education:		
123-45-6789	11/20/2010	📅 (Age: 13)	CHILD	×	▾	7 TH GRADE	×	▾

School:
FORT CRAIG SCHOOL   ×   ▾

Notes:
NOTES

Add the **Level of Education** and **School** along with any necessary **Notes**.

This completes filling out the *Others Involved* entry. Click **Save** in the bottom right to finish this entry. If you have any more to add, simply repeat the process.

SAVE   DELETE   EXIT

Notes Tab

The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.

Use **Add Note** to add a new note.

Animal Control Module

The **View Story** button will show all notes (except Narrative) that have been added on one page.

Images Tab

Images   At

The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.

DOWNLOAD ALL IMAGES   EXPORT GRID TO FILE   ADD IMAGE   ADD IMAGES

To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

YOUR NAME

AUDITS   TOPICS   REPORTS   MAINTAIN FILES

Click **YOUR NAME**

❶

YOUR NAME

Change Password

Manuals   ❷   Click **HERE**

Dashboard Configuration

Download System Tray Installer

File name: IsomsSystemTrayInstaller.exe

Save as type: Application (*.exe)

❸   Download & Install

After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab

The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the ⬇ icon to download the attachment to the computer.

You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.

You can also **Download All PDFs** at once by clicking the appropriate button.

If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

Euthanization Record Reports

iSOMS allows you to print different types of reports for *Euthanizations:*

- ➢ **Euthanization Lists**
- ➢ **Form Reports**
- ➢ **Custom Reports**

To access the reports, begin on the iSOMS home screen and navigate to:

Records ➔ Back Office ➔ Animal Control ➔ Euthanizations
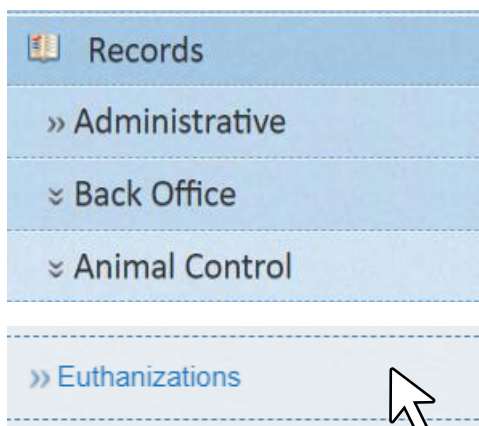
Now click on the **Reports** button in the upper right corner and select your desired report.
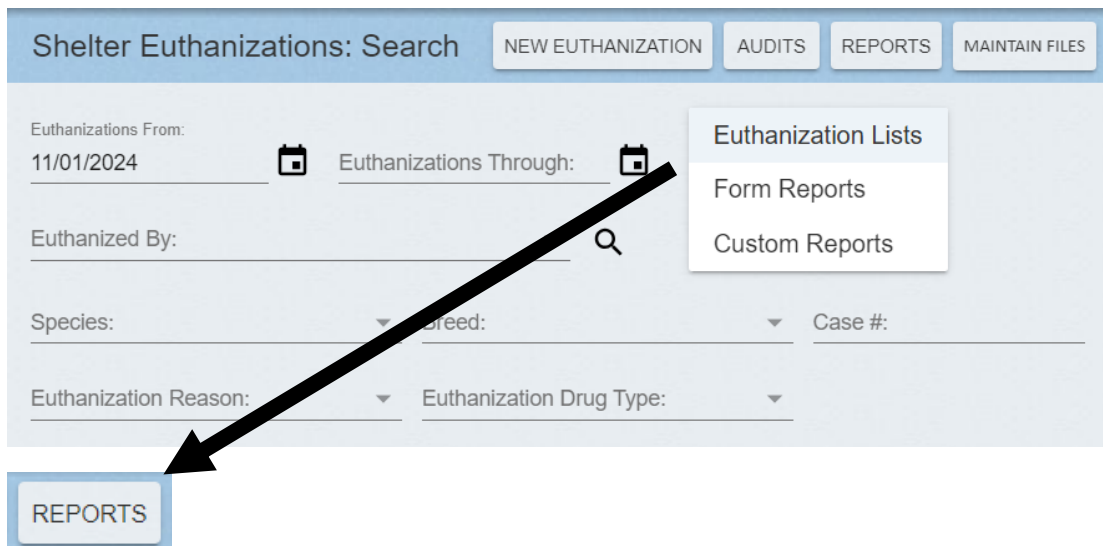
Euthanization Lists

Euthanization Lists reports a list of euthanization / tranquilization records over a certain date range so you can quickly view records. *Report Style* has an option to create a standard list, a list grouped by euthanization reason, grouped by department. You can use the radio selector to choose the location (in-field or in-shelter) of the euthanization.

Shelter Euthanizations: List Reports

Euthanization Location:
⦿ All   ○ Euthanized In Field   ○ Shelter Euthanization

Report Style
List

Euthanizations From:
03/03/2025

Euthanizations Through:
03/03/2025

Euthanization Reason: Euthanized By:

☐ All Agencies   ☐ Hide Notes

Report Format:
⦿ PDF   ○ Excel   ○ XML   ○ SQL

VIEW   DOWNLOAD   EMAIL   CLEAR FILTER

Example on the next page

Animal Control Module

Set your parameters for the report and click **View** or **Download** to view the report.

YOUR AGENCY

Shelter Euthanizations List

Euthanized Dates From 12/01/2024 Through 03/03/2025   Page   1   of   1

Euthanized Date	Euthanized Reason	Case Number	Department	In Field
02/03/2025		2025-0001		Yes
Location:		CSZ:	Zone:	
Species:		Breed:	Color:	
Euthanized Drug:		Amount: 0	Euthanized By:	
Tranquilizer Drug:		Amount: 0	Tranquilized By:	
02/03/2025	WILDLIFE	2025-0002	ALCOA	Yes
Location: 1110 MERCHANT DR		CSZ: KNOXVILLE, TN 37912	Zone: 10	
Species: DOG		Breed: GREAT DANE	Color: BROWN	
Euthanized Drug: QUITE FATAL		Amount: 200	Euthanized By: ELDER, MARTIN	
Tranquilizer Drug: EASY SLEEP		Amount: 100	Tranquilized By: ELDER, MARTIN	

Shelter Registrations & Tags

iSOMS has the **Registration and Tags** module to keep track of animal's identification methods. You can record various information about the tag or ID for the animal, add details on the animal itself, and run reports on the records in this module.

To add or search for a registration/tags record, begin on the iSOMS home screen.
Click on the following:

Records → Back Office → Animal Control → Registration/Tags
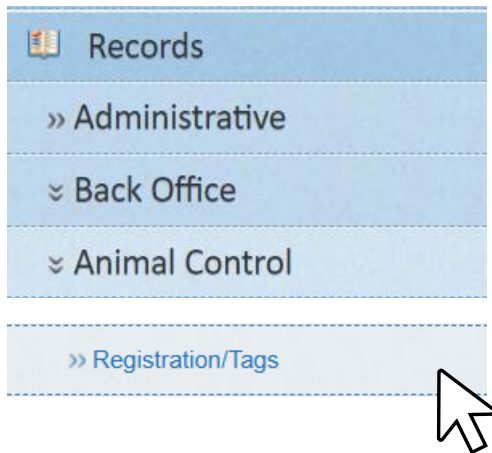
Searching for Shelter Registration / Tags Records

This will open the **Shelter Registration/Tags: Search** screen. Here you can look up current registration records if you need to view or edit their record. To look up a record, type in the search filter fields and click on one of the **Lookup** buttons.

Animal Control Module

After you do your search, you can double click on the entry or click on the pencil icon on the far right (✏) to open the screen to view, edit, or delete it.

Adding Shelter Registration / Tags Records

In order to add a new record, click on the **New Tag** button on the search screen. This will open a Master Name search so you can link the registration / tag record to the Master Name of the animal's owner.

Enter the Master Name information of the owner of the animal being registered and search with **Lookup**, or, if the person is not in your Master Name system, click **New Master Name** in the upper right.

Once you have selected the appropriate Master Name, enter any additional information needed and then click **Save & Create Tags Record.**

After creating a record from a Master Name, you will be brought to a screen where you can add information on the registration / tag record you need to add.

Animal Name:	Species: ▼	Breed: ▼	Sex:
Weight: 0	Height: 0	Size:	

Color:	Coat:	Hair Length:	Ear Length:	Tail Length:

Age Class:	Age:	☐ Altered

Microchip Brand:	Microchip Id #:	Microchip Date: 📅	Microchip Expires: 📅

Times Fined: 0	Disposition:	Disposition Date: 📅	Time:

> Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.) Codes are listed on the right of the page for easy reference.

❗

First, enter the animal's name and species.

Animal Name:	Species:
CHIPPY	SQUIRREL

Add the **Breed** and **Sex** of the animal being registered.

Breed:		Sex:
FLYING SQUIRREL	✕ ▼	MALE

Now add the **Weight** and **Height** of the animal, as well as the general **Size** (i.e. small, medium, large). Height is usually listed as feet as the first digit and inches as the new two.
(*Example*: a 2 ft. 3 in. tall animal would be listed as 203)

Weight	Height:	Size:
15	008	SMALL

▼ Animal Codes

▶ Animal Names
▶ Species
▶ Breed
▶ Sex
▶ Size
▶ Color
▶ Coat
▶ Hair Length
▶ Ear Length
▶ Tail Length
▶ Age Class

Animal Control Module

Add the animal's **Color**, **Coat** type (smooth, thick, curled, etc.), **Hair Length, Ear Length,** and **Tail Length.**

Color:	Coat:
BROWN	COAT

Hair Length:	Ear Length:	Tail Length:
SHORT	SHORT	SHORT

Add the **Age Class** (age estimate such as young or old) and/or exact **Age**, if known.

Age Class:	Age:
YOUNG	2

If any of the above details needed to be changed, you can use the **Altered** checkbox to let others know you changed this. It is recommended you use the **Notes** tab to keep track of any info long term.

☑ Altered

The next section of fields simply lists information about the microchip and disposition of the chip/tag.

Add the **Microchip Brand** and **Microchip ID #:**

Microchip Brand:	Microchip Id #:
TAG A LOT	12345

▼ Tag Codes

► Microchip Brands
► Dispositions

Add the date the Microchip was issued in **Microchip Date** and the expiration date under **Microchip Expires.**

Microchip Date:	Microchip Expires:
04/01/2025 📅	04/01/2026 📅

If the owner was fined, list the number of times they were fined in **Times Fined.** If the microchip/tag has a disposition since the animal is lost or deceased, you can list the disposition and the date and time it occurred in **Disposition, Disposition Date,** and **Disposition Time.**

Times Fined:	Disposition:	Disposition Date:	Time:
1	LOST	04/05/2025 📅	12:00:00

If you would like to add an image of the animal, you can click **Upload Image (⬆) or Take New Photo (⊕)** on the right. Select or take the image and it will be added.

Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

Save is located at the top of the screen.

SAVE   DELETE
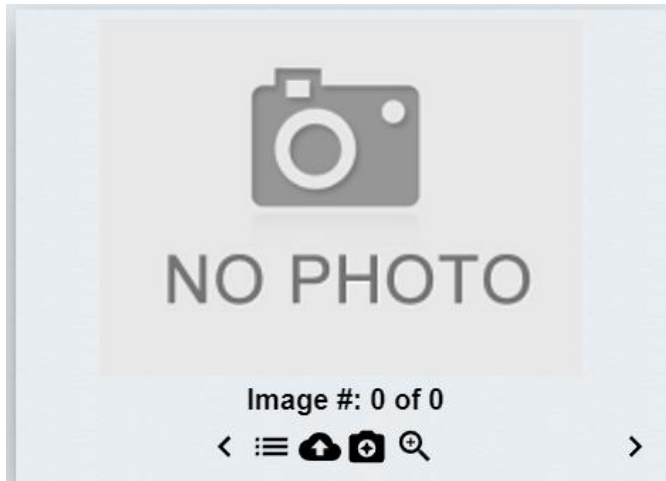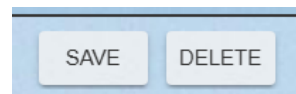
Now that you have filled out the fields, you can use the tabs below the fields to record additional information on the item. See the *Tabs* section for more information.

Shelter Registration / Tags Tabs

Summary

Fill out the tabs below the fields for shelter registration/tags records as needed. The **Owner** tab will be auto filled out when you create the entry, but you can also fill in a bit more info, or even create a history of owners with the **Owner History** tab. The **Registration** tab records information about licenses (such as tags) that belong to this animal. You can list any vaccinations the animal has received under the **Vaccinations** tab. The **Receipts** tab keeps info on the monetary receipts for tagging, registering, etc. of the animal.

Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents. (Notes, Images, and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)
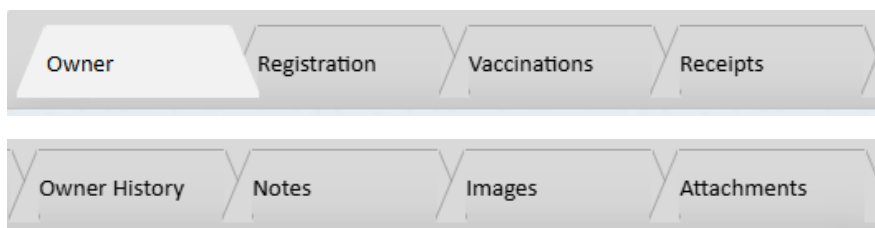
Owner Tab

Owner

The **Owner** tab lists identifying information about the animal's *current* owner. Most of this info should be filled in automatically when you created the record from the Master Name, but feel free to add more if desired.

Last Name:	First Name:	Middle Name:		
DOE	JAMES	RANDAL	Jr/Sr:	CREATE OWNER HISTORY

House #: 1142 Direction: Street: OXFORD HILLS Apt/Lot #: City: MARYVILLE

State: TN ZipCode: 37771

Home Phone: (865)-111-1111 Cell Phone: (865)-555-2222 Work Phone: (865)-555-3333 Email: JAMESDOE@FAKEWEBSITE.COM Text: 865-555-6789

If the owner is changing for this animal, you can click the **Create Owner History** button. This button will clone the info on this tab into the owner history. Then, add the current information for the *new* owner under this tab. There is more you can input under the Owner History if this tab does not have enough fields that you would like to fill in.
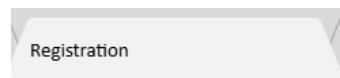
CREATE OWNER HISTORY

Owner History

EXPORT

1 Person

	Entry Date	How Involved	Relationship	Last Name	First Name	Middle
✏️	04/02/2025			DOE	JAMES	RANDAL

Animal Control Module

Registration Tab

Registration

The **Registration** tab lets you record license and registration entries for this animal.
To view, edit, or delete a current entry, double-click an entry from the table.

2 Licenses							EXPORT GRID TO FILE	ADD LICENSE
Issued Date	**Issued By**	**Tag #**	**Tag Length**	**Effective Date**	**Expires On**	**Vet**	**Status**	
04/01/2024	ELDER, MARTIN WILLIAM - INV	456	ONE(1) YEAR	04/01/2024	04/01/2025	ANIMAL MEDICAL CLINIC	History	✏
04/03/2025	ELDER, MARTIN WILLIAM - INV	123	ONE(1) YEAR	04/01/2025	04/01/2026	ANIMAL MEDICAL CLINIC	Active	✏

To create a new entry, click **Add License** in the upper right and add information as needed.

ADD LICENSE
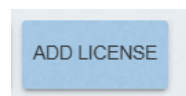
View License

Entered On: 04/03/2025 14:51

Issued Date:
04/01/2024

Issued By:
603 ELDER, MARTIN WILLIAM -INV

Tag #:
456

Tag Length:
ONE(1) YEAR

Effective Date:
04/01/2024

Expires On:
04/01/2025

Vet:
ANIMAL MEDICAL CLINIC

SEARCH   EDIT   ADD

Address 1: 234 W FAKE ST

Address 2:   **Apt/Suite #:**

City: KNOX   **State:** TN   **Zip Code:** 37772

Phone: (865) 555-6789   **Email:** ANIMALMC@FAKEWEBSITE.COM

Latitude: 35.7976978   **Longitude:** -84.2067992

AUDITS   MAINTAIN FILES   SAVE   DELETE   EXIT

Add the **Issue Date.** If you are the one who issued this registration, your name will be entered automatically. Otherwise, type the name of the employee / officer who issued it.

Issued Date:	Issued By:
04/01/2024 📅	603 ELDER, MARTIN WILLIAM -INV ✕ ▾ 🔍

Now add the **Tag Number** and how long the tab should be under **Tab Length**. Record the start and end date for the registration under **Effective Date** and **Expires On.**

Tag #:	Tag Length:
456	ONE(1) YEAR ✕ ▾

Effective Date:	Expires On:
04/01/2024 📅	04/01/2025 📅

Finally, add the vet where the registration was issued or the tag applied.

Department:
ALCOA   SEARCH   EDIT   ADD

Address 1: 123 FAKE ST

Address 2:   **Apt/Suite #:**

City: ALCOA   **State:** TN   **Zip Code:** 37912

Phone: (865) 555-1234   **Email:** EMAIL@WEBSITE.COM

Latitude: 36.0091467   **Longitude:** -83.9797173 📍

If you already have the vet in your records, simply type the name (such as **VET ABC**) and it will appear automatically. If not, see *Appendix C, Business Records* on page 195 for instructions on adding, searching, and editing business records in iSOMS.

Vet:
ANIMAL MEDICAL CLINIC   SEARCH   EDIT   ADD

Address 1: 234 W FAKE ST

Address 2:   **Apt/Suite #:**

City: KNOX   **State:** TN   **Zip Code:** 37772

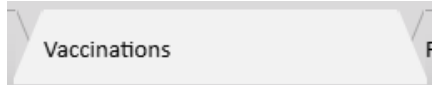**Phone:** (865) 555-6789   **Email:** ANIMALMC@FAKEWEBSITE.COM

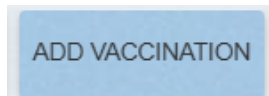(!)   ▼ **Animal Codes**

            ▶ Animal Vets

Vaccinations Tab

The **Vaccination** tab lets you record license and registration entries for this animal.
To view, edit, or delete a current entry, double-click an entry from the table.

Issued Date	Issued By	Tag #	Tag Length	Effective Date	Expires On	Vet	Vaccination Given By	Manufacturer	Drug	Status	
04/03/2025	ELDER, MARTIN WILLIAM -INV	234	ONE(1) YEAR	04/01/2025	04/01/2026	ANIMAL MEDICAL CLINIC	ELDER, MARTIN WILLIAM -INV	OTHER	OTHER	Active	✏

1 Vaccination

To create a new entry, click **Add Vaccination** in the upper right and add information as needed.

Even though this is the vaccination tab, there is info to track the tags as well. Add the **Issue Date** for the registration**.** If you are the one who issued this registration, your name will be entered automatically. Otherwise, type the name of the employee / officer who issued it.

Issued Date:	Issued By:
04/01/2024 📅	603 ELDER, MARTIN WILLIAM -INV ✕ ▾ 🔍

Now add the **Tag Number** and how long the tab should be under **Tab Length**. Record the start and end date for the registration under **Effective Date** and **Expires On.**

Tag #:	Tag Length:
456	ONE(1) YEAR ✕ ▾

Effective Date:	Expires On:
04/01/2024 📅	04/01/2025 📅

Finally, add the vet where the vaccination was given.

Department:
ALCOA   SEARCH   EDIT   ADD

Address 1: 123 FAKE ST

Address 2:   **Apt/Suite #:**

City: ALCOA   **State:** TN   **Zip Code:** 37912

Phone: (865) 555-1234   **Email:** EMAIL@WEBSITE.COM

Latitude: 36.0091467   **Longitude:** -83.9797173 📍

If you already have the vet in your records, simply type the name (such as **VET ABC**) and it will appear automatically. If not, see *Appendix C, Business Records* on page 195 for instructions on adding, searching, and editing business records in iSOMS.

Vet:
ANIMAL MEDICAL CLINIC   SEARCH   EDIT   ADD

Address 1: 234 W FAKE ST

Address 2:   **Apt/Suite #:**

City: KNOX   **State:** TN   **Zip Code:** 37772

Phone: (865) 555-6789   **Email:** ANIMALMC@FAKEWEBSITE.COM

❗ ▼ **Animal Codes**
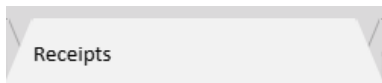   ▶ Animal Vets

Finally, add information about the vaccine:

Add the **Manufacturer**, the **Drug,** the **Quantity** (such as **1** for 1 dose or **200** for 200 ml). You can also add the **Lot #, Serial #**, and who gave the vaccine (under **Vacc. Given By**).

Manufacturer:		Drug:		Quantity:
OTHER	✕ ▾	OTHER	✕ ▾	1
Lot #:	Serial #:	Vacc. Given By:		
123	456	603 ELDER, MARTIN WILLIAM -INV	✕ ▾ 🔍	

Receipts Tab

Receipts

The **Receipts** tab lets you record money or other payment receipts for this animal.

To print a receipt, click **Print Receipt** 🖶 To void a receipt, press **Void Receipt** ⊘

GENERATE RECEIPT   EXPORT GRID TO FILE

1 Receipt

Receipt Date	Employee	Receipt #	Amount	Payment Type	Document #	Void Date		
04/03/2025 15:23	USER	202500001	$0.00	CASH	123	04/03/2025 15:23	⊘	🖶

Receipt Notes: 100

To create a new receipt, click **Generate Receipt** and add the **Payment Type, Doc #,** and any **Comment.**

GENERATE RECEIPT

Owner History Tab
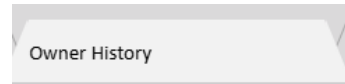
Owner History

The **Owner History** tab lets you record owner history, which can include the current owner and/or past owners. The **Owner** tab is usually used for the current owner but could also be entered here if desired. To view, edit, or delete a current entry, double-click an entry from the table.

When you add a new entry, you should fill out only the tabs you need to fill out to track information and then save it. Details are provided for each of the sub-tabs below, although each sub-tab is relatively intuitive. Add information as needed.

1 Person   EXPORT GRID TO FILE   ADD PERSON

	Entry Date	How Involved	Relationship	Last Name	First Name	Middle	Post Name	DOB	Age	Home Phone
✏	04/02/2025	OWNER	OWNER	DOE	JAMES	RANDAL		01/01/1965	60	(865) 111-1111

In order to add a new entry, click the **Add Person** button. Confirm you want to add a new person involved, and then you will see the options to fill in the fields.

ADD PERSON

View Others Involved

SEARCH PEOPLE   How Involved: Relationship: SCAN DL
CHECK NCIC

☐ Hide Name on Report   ☐ Hide Details on Report   ☐ Safety Restraints Used

Last Name: First Name: Middle Name:
DOE   JAMES   RANDAL   Jr/Sr:

Nickname/AKA:

House #:   Street: City:
1142   Direction: OXFORD HILLS   Apt/Lot #:   MARYVILLE

State:
TN   ✕   ZipCode: County:

Home Phone:
(865)-111-1111   Cell Phone: Work Phone: Email:

NO PHOTO

Image #: 0 of 0

| Biographical | Employer | Juvenile / Child Info |

The fields at the top list the person's involvement and relationship to the animal. Then identifying fields are below, along with additional headers to add extra info such as *Biographical, Employer,* and *Juvenile / Child Info*. For details, see below.

Quick Fill from Master Names

If you already have information on someone as a Master Name, then you can add it quickly by clicking the **Search People** button in the upper left.

SEARCH PEOPLE

This will open the Master Name search screen. Input a name and other identifying info (such as DL number or SSN, etc.), then click **Lookup.**

Select the person from the list to add them, and then click **Save and Select**. This will autofill information you have on them.

Filling in Information

How Involved:
PROPERTY OWNER   ✕   ▼   Relationship: SCAN DL

First, fill in **How Involved** dropdown with how the person is connected to the incident.

How Involved:
PROPERTY OWNER   ✕   ▼

Add the **Relationship** this person has to the other people involved.

Relationship:
BROTHER

Now you can scan the person's driver license if you click **Scan DL**.

SCAN DL

☐ Hide Name on Report   ☐ Hide Details on Report   ☐ Safety Restraints Used

If you need to hide this name or details about the report, check **Hide Name** or **Hide Details**.

Now fill out the information about the person if necessary:

Last Name: First Name:
DOE   JAMES   Middle Name: Jr/Sr: ▼

Nickname/AKA:

House #:   Street: City:
123   Direction: MADE UP ST   Apt/Lot #:   MURFREESBORO

State: ZipCode: County:
TN   ✕ ▼   55555   ●   RUTHERFORD

Home Phone: Email:
(865)-555-6789   Cell Phone: Work Phone: email@email.com

Headings

Below the main fields, the headings are available to type additional information about the person.

Fill in the biographical information under this heading, including SS and DL numbers.

Race:			Sex:			Height:	Weight:	Hair Color:			Eye Color:		
HISPANIC	X	▼	MALE	X	▼	6	180	BLACK	X	▼	BLACK	X	▼

Social Security #:	Date of Birth:		Martial Status:			Military:	
123-45-6789	11/20/2000 📅 (Age: 23)		COMMON LAW X ▼				▼

Person Type(forms): ▼

Features: _____ Clothing: _____ Gang: _____

DL State:			Driver License #:	Class:	Expiration Date:	Restrictions:	Local ID:	Other ID:
TN	X	▼	123-45-67890	D	10/26/2024 📅			

Here you can add an employer record. The Employer system works by storing records of employers. This makes it so that you do not have to continuously re-enter the same information on the same business. See *Appendix C, Business Records* on page 195 for more information.

Employer:
CHICK-FIL-A   SEARCH   EDIT   A

Address 1: 555 CHICKEN WAY

Address 2:   **Apt/Suite #:**

City: KNOXVILLE   **State:** TN   **Zip Code:** 37912

Phone: (865) 555-1234   **Email:** EATMORECHIKN@CFA.COM

Animal Control Module

Juvenile / Child Info

Here you can fill out information on the individual if they were a juvenile / child.

Social Security #:	Date of Birth:		Person Type(forms):	Level Of Education:
123-45-6789	11/20/2010	(Age: 13)	CHILD	7 TH GRADE

School:
FORT CRAIG SCHOOL

Notes:
NOTES

Add the **Level of Education** and **School** along with any necessary **Notes**.

This completes filling out the *Owner History* entry. Click **Save** in the bottom right to finish this entry. If you have any more to add, simply repeat the process.

SAVE   DELETE   EXIT

Notes Tab

Notes	Im
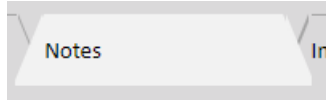
The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

Narrative

🖨 ✏

			VIEW STORY	EXPORT GRID TO FILE	ADD NOTE

1 Note

		Entry Date	Note Date	Employee	Note Type	Notes
✏	🖨	08/23/2024 14:22:56	08/23/2024 14:22:56			TAKE NOTE

TAKE NOTE

Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.

Main Narrative

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis

Use **Add Note** to add a new note.

ADD NOTE

The **View Story** button will show all notes (except Narrative) that have been added on one page.

Images Tab

Images	At

The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.

DOWNLOAD ALL IMAGES	EXPORT GRID TO FILE	ADD IMAGE	ADD IMAGES

To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab

The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the ![download icon] icon to download the attachment to the computer.

You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.

You can also **Download All PDFs** at once by clicking the appropriate button.

If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

Shelter Registration / Tags Reports

iSOMS allows you to print different types of reports for *Registration / Tags:*

- ➢ **Tag Lists**
- ➢ **Detailed Reports**
- ➢ **Receipt Reports**

- ➢ **Form Reports**
- ➢ **Custom Reports**

To access the reports, begin on the iSOMS home screen and navigate to:

Records ➔ Back Office ➔ Animal Control ➔ Registration/Tags
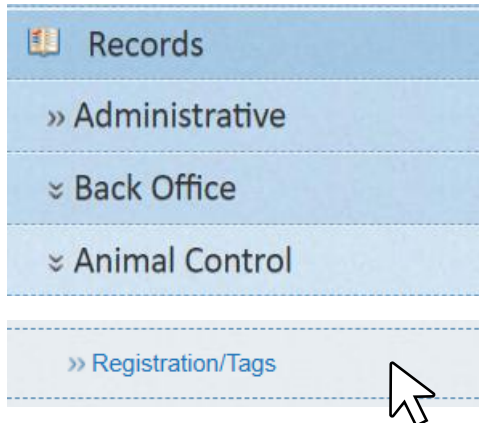
Now click on the **Reports** button in the upper right corner and select your desired report.
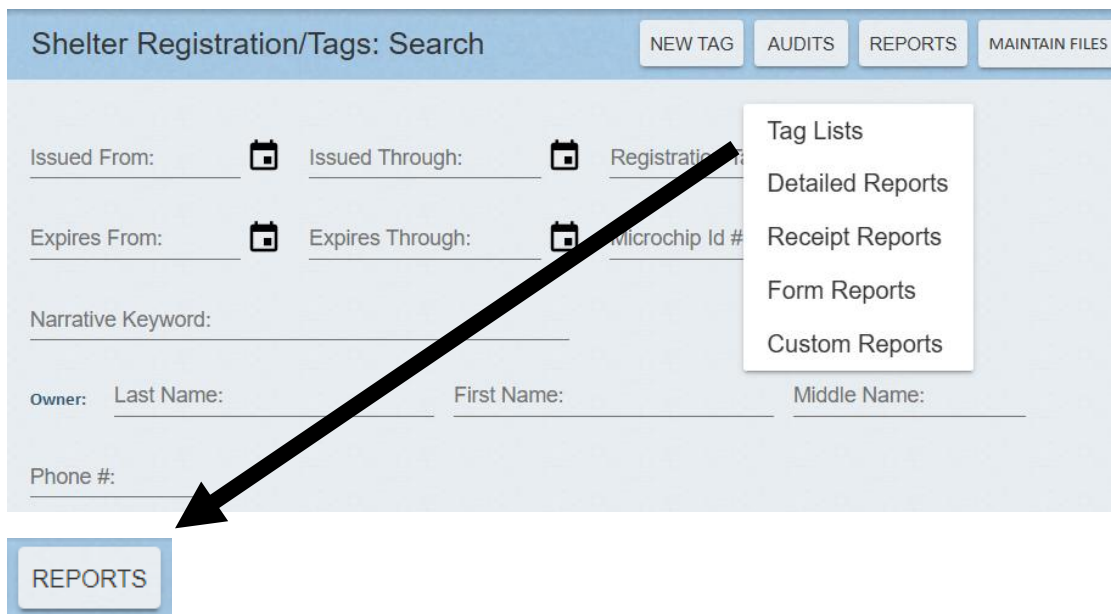
Tag Lists

Tag Lists reports a list of registration / tag records over a certain date range so you can quickly view records. *Report Style* has an option to create a standard list or a list grouped by species. You can specify the species listed on the report, select active registrations only, and use the radio list to choose issue date or expiration date.

Set your parameters for the report and click **View** or **Download** to view the report.

Detailed Report

Shelter Registration/Tags: Detailed Report goes over tags in detail so you can view records in an information-complete report. You can also set it to a specific record if you click the **Reports** button from that record. Choose anything you would like to hide and then click **View** or **Download** to view the report.

> *Example on Next Page*

Animal Control Module

Shelter Tags Details

Disposition:	**LOST**	Disposition Date:	**04/05/2025**
Times Fined:	**1**		

Owner Information

Owner Name:	**DOE, JAMES**	Home Phone:	**(865) 111-1111**
Cell Phone:	**(865) 555-2222**	Work Phone:	**(865) 555-3333**
Email:	**JAMESDOE@FAKEWEBSITE.COM**	Text:	**865-555-6789**
Address:	**1142 OXFORD HILLS**	Apartment:	
CSZ:	**MARYVILLE, TN 37771**		

Animal Information

Animal Name:	**CHIPPY**	Species:	**SQUIRREL**
Breed:	**FLYING SQUIRREL**	Size:	**SMALL**
Color:	**BROWN**	Age:	**2**
Microchip Brand:	**TAG A LOT**	Microchip Id:	**12345**
Microchip Date:	**04/01/2025**	Microchip Exp. Date:	**04/01/2026**

Registration Licenses

Issued Date	Issued By	Tag #	Tag Length	Status
04/03/2025	**ELDER, MARTIN**	123	**ONE(1) YEAR**	**Active**
Effective Date: **04/01/2025**			Expires Date: **04/01/2026**	
04/01/2024	**ELDER, MARTIN**	456	**ONE(1) YEAR**	**History**
Effective Date: **04/01/2024**			Expires Date: **04/01/2025**	

Total Licenses: **2**

Vaccines

Issued Date	Issued By	Tag #	Tag Length	Status
04/03/2025	**ELDER, MARTIN**	234	**ONE(1) YEAR**	**Active**
Effective Date: **04/01/2025**			Expires Date: **04/01/2026**	
Manufacturer: **OTHER**			Drug Type: **OTHER**	
Lot Number: **123**			Serial Number: **456**	
Drug Quantity: **1**			Given By: **ELDER, MARTIN**	

Total Vaccines: **1**

Receipt Reports

Receipt Reports will list receipts on a report over a certain date range.

Set your parameters for the report. You can restrict to certain owners, tag numbers, payment types, etc. Make sure to add at a date range in **Date From** and **Date Through**. Click **View** or **Download** to view the report.

Shelter Traps

iSOMS has the **Traps** module to keep track of traps put out and animals caught. You can record where the trap was placed, any animal caught, who requested the trap, who placed the trap, and who picked up the trap.

To add or search for a trap record, begin on the iSOMS home screen. Click on the following:

Records → Back Office → Animal Control → Traps
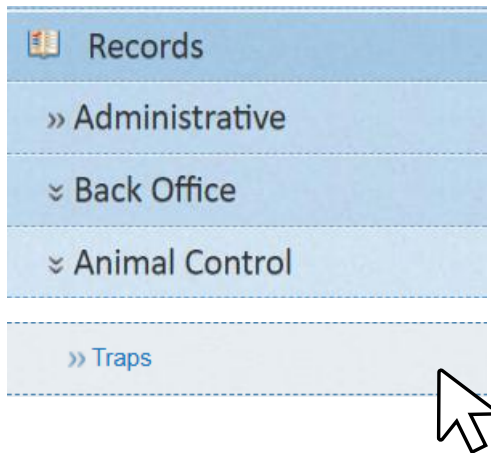
Searching for Trap Records

This will open the **Shelter Traps: Search** screen. Here you can look up current trap records if you need to view or edit their record. To look up a record, type in the search filter fields and click on one of the **Lookup** buttons.

After you do your search, you can double click on the entry or click on the pencil icon on the far right (✏) to open the screen to view, edit, or delete it.

Shelter Traps: Search Results

LOOKUP | NEW TRAP | MAPS | REPORTS | MAINTAIN FILES

Search Criteria ▶

Search Results

EXPORT GRID TO FILE | VIEW ALL AGENCIES

250 Records

Request Date	Placed By	Pickup Date	Last Name	First Name	Address1	City	ZipCode	Trap Type	Trap Reason	✏
	MARTIN									
08/19/2006	ELDER, MARTIN	08/22/2006	OWNER	HOME		MARYVILLE		OTHER		✏
09/14/2006	ELDER, MARTIN	09/15/2006	OWNER	HOME		MARYVILLE		OTHER		✏
10/07/2006	ELDER, MARTIN	10/10/2006	OWNER	HOME		MARYVILLE		OTHER		✏
11/10/2005	ELDER, MARTIN	11/16/2005	OWNER	HOME		MARYVILLE		OTHER		✏
02/09/2006	ELDER, MARTIN	02/21/2006	OWNER	HOME		TOP OF THE WORLD	37878	OTHER		✏
02/19/2006	ELDER, MARTIN	02/27/2006	OWNER	HOME		MARYVILLE	37737	OTHER		✏
05/18/2006	ELDER, MARTIN	05/26/2006	HOMEOWNER			MARYVILLE	37803	OTHER		✏
06/12/2006	ELDER, MARTIN	06/16/2006	HOMEOWNER			MARYVILLE	37801	OTHER		✏
06/29/2006	ELDER, MARTIN	07/01/2006	OWNER	HOME		MARYVILLE		OTHER		✏
07/28/2006	ELDER, MARTIN	08/05/2006	OWNER	HOME		MARYVILLE		OTHER		✏
10/09/2006	ELDER, MARTIN	10/17/2006	OWNER	HOME		MARYVILLE		OTHER		✏

Adding Shelter Trap Records

In order to add a new record, click on the **New Trap** button on the search screen. This will open a Master Name search so you can link the trap record to the Master Name of the person who requested the trap.

Enter the Master Name information of the person requesting the trap and search with **Lookup**, or, if the person is not in your Master Name system, click **New Master Name** in the upper right.

Once you have selected the appropriate Master Name, enter any additional information needed and then click **Save & Create Traps Record.**

Animal Control Module

After creating a record from a Master Name, you will be brought to a screen where you can add information on the trap record you need to add.

> Various of these fields are dropdown, not freeform. Many dropdown fields can now be added to immediately when editing records. If you need to edit or delete options, these can be accessed in **Maintain Files** (see *Appendix A, Maintain Files Procedure* on page 190 for how to do this.) Codes are listed on the right of the page for easy reference.

First, add a **Case Number** and **Request Date / Time**. This Case Number could be the same as a CAD number or whatever numbering system you would like.

Add the **Trap Type** and the reason for the trap under **Trap Reason.**

Animal Control Module

The next set of fields is for recording the place where the animal was encountered / trap was placed. **Common/Business Name** is the common or business name of the place, such as the mall or "The Green", for example. **Subdivision / Area / Building Complex** and **Zone** offers options of places where the animal was found / trap was placed. These are determined by your agency.

Common/Business Name:
THE MALL

Subdivision/Area/Building Complex:
DOE

Zone:
0101 101 ZONE 1

Enter the address fields for the location of the trap.

House #: **123** Direction: Street: **FAKE ST** Apt/Lot #: City: **KNOX**
State: **TN** ZipCode: **37912** Latitude: **36.0091467** Longitude: **-83.9797173**

You can use the next set of fields to record the date and time the trap was placed along, when it should be picked up, when it actually was picked up, and which employee performed those jobs. This section of fields also has a place to put trap **Disposition**, such as success, failure, trap stolen, or other.

▼ **Shelter Trap Codes**

▶ Dispositions

Placed Date: **04/07/2025** Time: **00:00:00** Placed By: **603 ELDER, MARTIN WILLIAM -INV**
Estimated Pickup Date: **04/11/2025** Time: **00:00:00** ✔ Successful
Actual Pickup Date: **04/14/2025** Time: **00:00:00** Disposition: **PICKED UP - SUCCESS**

When entering **Placed** By, you can simply type in the box or search manually by using the magnifying glass. (See *Appendix B, Searching Officers* on page 194 if you want information on this.)

Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

Save *is located at the top of the screen.*
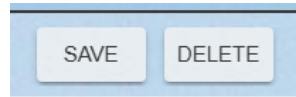
Now that you have filled out the fields, you can use the tabs below the fields to record additional information on the item. See the *Tabs* section for more information.

Shelter Traps Tabs

Summary

Fill out the tabs below the fields for shelter traps records as needed. The **Requested By** tab will be auto filled out when you create the entry, but you can also fill in a bit more info if necessary. The **Animal** tab records information about the animal you are trying to catch / have caught. The **Department** can be used to record the department keeping the animal or which has placed the trap.

Notes, Images, and **Attachments** tabs are available if you need to take additional notes or upload images and documents. (Notes, Images, and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)

Requested By	Animal	Department

Notes	Images	Attachments

Requested By Tab

Requested By

The **Requested By** tab lists identifying information about the person who requested the trap. Most of this info should be filled in automatically when you created the record from the Master Name, but feel free to add more if desired.

Last Name:	First Name:	Middle Name:	Jr/Sr:			
DOE	JAMES	RANDAL				

House #:	Direction:	Street:	Apt/Lot #:	City:	State:	ZipCode:
1142		OXFORD HILLS		MARYVILLE	TN	

Home Phone:	Cell Phone:	Work Phone:	Email:
(865)-111-1111			

Animal Tab
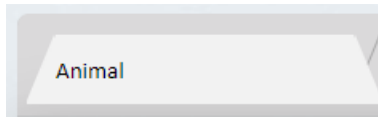
The **Animal** tab lists information about the animal related to the trap. Fill out known information and additional information can be added later if needed.

Enter the **Species, Breed,** and **Sex** of the animal.

Add the **Weight, Height,** and **Size** of the animal.

Add any other known details about the animal, such as the **Color, Coat, Hair Length, Ear Length, Tail Length, Age Class,** and **Age.**

Animal Control Module

Department Tab

The **Department** tab lets you select a department relevant to the animal, such as the one keeping or handling the animal. If you already have the department in your records, simply type the name (such as **DEPARTMENT FOR SHELTER ANIMALS**) and it will appear automatically. If you don't have the department in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business Records* on page 195.

Notes Tab

The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.

Use **Add Note** to add a new note.

The **View Story** button will show all notes (except Narrative) that have been added on one page.

Images Tab

Images   A

The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.

DOWNLOAD ALL IMAGES   EXPORT GRID TO FILE   ADD IMAGE   ADD IMAGES

To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab

The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the ⬇ icon to download the attachment to the computer.

You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.

You can also **Download All PDFs** at once by clicking the appropriate button.

DOWNLOAD ALL PDFS

File name:	files.pdf
Save as type:	PDF File (*.pdf)

If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

SCAN

Scan Attachment

ISOMS Windows App Must Be Running

File Name: _____   Report Date: _____ 📅

Category: ▼   Sub-Category: ▼

Description:

CANCEL   SCAN DUPLEX   SCAN AUTO

Shelter Traps Reports

iSOMS allows you to print different types of reports for *Traps:*

- ➤ **Active Traps Lists**
- ➤ **Traps Lists**

- ➤ **Traps Stats**
- ➤ **Traps Forms**

To access the reports, begin on the iSOMS home screen and navigate to:

Records → Back Office → Animal Control → Traps
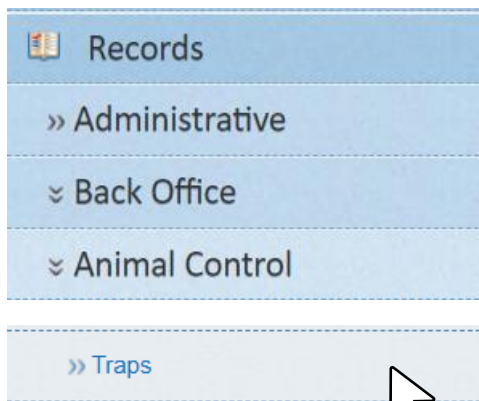
Now click on the **Reports** button in the upper right corner and select your desired report.
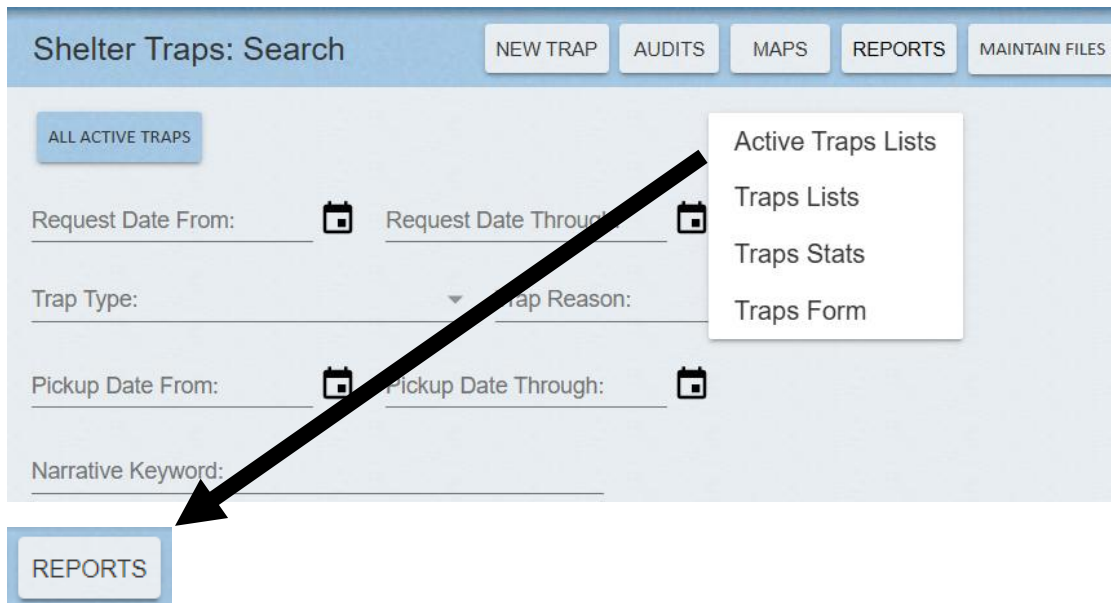
Active Traps Lists

Active Traps Lists gives you a list of **active** trap records for a chosen "placed" date range so you can quickly view records.

Report Style lets you pick all active traps, or only traps that are successful / unsuccessful.

You can also narrow the report to only include certain trap types, the city where the trap is located, or the reason for trap placement. Set your parameters for the report and click **View** or **Download** to view the report.

Traps Lists

Traps Lists gives you a list of **all** trap records for a chosen "pick up" date range so you can quickly view records. Use the radio menu at the bottom to select *all* traps, *successful* traps, or *unsuccessful* traps.

You can also narrow the report to only include certain trap types, the city where the trap is located, or the reason for trap placement. Set your parameters for the report and click **View** or **Download** to view the report.

Traps Stats

Traps Lists gives you a statistical overview of trap records for a chosen "pick up" date range so you can quickly view stats about records.

Set your parameters for the report and click **View** or **Download** to view the report.

2222

Animal Control Module

Animal

3 Locate the **Animal** tab. If you edit or add an entry to the fields, iSOMS will suggest current codes. If you need to add a new entry, simply type what you need and iSOMS will ask you to save it here. For example, if you need to add a new animal name or breed, just type it in and when you click off the field, it will ask to save it.

Animal Name:	Species:	Breed:
CHARLIE	DOG	MIXED ROTTWEILER

Color:	Coat:	Hair Length:
BEIGE	COAT	M

Known to Bite:	Demeanor:	Microchip Id:	Registration T
N	FRIENDLY	12345	67890

Animal Name:

JAMES

James is not a current code, but when we type it in and click somewhere outside the field, iSOMS will ask to save it.

Add Animal Name

'JAMES' doesn't exist in the system. Would you like to add it?

(Selecting 'NO' will clear the value.)

YES   NO

Code successfully added.

Maintain Files Example

The other method of adding codes (and the way to edit current codes) is to use Maintain Files. As an example, let's change the **Species** tab to have a new species, "Parrot". Navigate to the *Animal Shelter* module under **Records → Back Office → Animal Control**, and then click**:**

Maintain Files → Animal Codes → Species

This will open the list of all the current codes for *Species.* If you want to edit a current code, find it in the list that appears and double-click it.

To add a new code, click **New Record:**

On the screen that appears, type the **Code** (system hidden name) and **Description** (the actual words displayed for users), and then click **ADD** to add the code. This will open a new screen, but you can just hit **Save** and exit the code record; we do not need to add any special functionality.

If we go back to the *Animal Shelter* records, we will see our new option in the **Species** dropdown:

A Super User can follow this similar procedure to add additional codes for more options to almost any dropdown in the module.

Appendix B: Searching Officers

When assigning or recording officers, iSOMS offers a convenient method to search for officers right in the module you are using. We will use the **Disposition By** field from *Animal Shelter* → *Status* as an example.

First, the fastest way to find an officer for a field is to simply start typing their name. When you do, names will appear that you can click to quickly fill in their name and link their record to this field:

Second, you can click the magnifying glass 🔍 icon to search for an officer. Enter relevant name or identifying info and then click **Lookup**. Double-click or click the checkmark ✓ to add the officer to the field.

Appendix C: Business Records

iSOMS has various sets of business and organization records, which works by storing records of organizations. This makes it so that you do not have to continuously re-enter the same information on the same business or agency. We will use this as an example for **Vets** in *Animal Shelter,* but it works for all businesses and organizations that have fields that look like this. (**Rescue Groups**, **Departments**, etc.)

To add a new organization:

Click **Add** to add a new entry. Enter the organization information in the window, click **Add** at the bottom of the window, and then this will be marked as the animal's vet organization.

To edit a current organization:

Click **Edit** to edit the current organization which is selected. Click **Save** when you are done editing this organization.

Continued on the Next Page

To use an existing organization:

Click **Search** to use an existing organization.

Enter the name or other identifying info.

Click the **Lookup** button near the bottom of the window in order to find existing records.

Then scroll down the window and select the correct organization from the list by double-clicking their record.

This method can be used for any of the tabs or fields that require an organization, so that you do not have to retype information repeatedly. Examples are showing below.

For More Information

We hope this manual has been helpful to you and your agency.

If you have any questions, don't hesitate to call us at 888-644-5786.

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