Process for Remote Adoption Counseling

- Remote work will be tracked in the Remote Adoptions Logbook
- Adoptions will daily zoom meetings with adoptions staff so we're able to coordinate workload, communicate openly as a group and questions get answered quickly
    - 11 am morning huddle via Zoom, link sent by Ashley Tuesday-Saturday, and by another counselor on Sundays.

Adopter Support

- NYA Voicemail:
    - Dial 671-2399, enter id 2027275494, press #, enter pin
    - Dial same number, enter id 2027277369, press #, enter pin
- OGL Voicemail:
    - Call OGL phone numbers, wait to go to voicemail. Once you start getting the message select pound, type in the password, pound again. Front desk password is 7171 and for the adoptions phone it's 0207. After that you can listen to and write down the gist of the voicemail
- If the voicemail is regarding the medical center, write a rough transcript including phone number, name (if given), and what they are asking about and then email it to medicalcenter@humanerescuealliance.org, then delete
- For adoptions-related questions, record the name and number and necessary details, delete, then answer after you have checked all the voicemails in the box

Photos and Bios

- Foster provides photos and bios for their animal, submit to the photosbios email
- Volunteers and staff will upload to PP

Meet and Greet

- Potential adopters will reach out directly to the foster to coordinate on meeting the animal. Foster will provide basic information about the animal at that time
- If the adopter is ready to fill out a questionnaire, foster will provide the link to an online adoption questionnaire, which will be checked daily by adoptions staff. Counselors will reach out within one business day to schedule counseling
- For adopters who are unable or unwilling to navigate the online questionnaire, fosters will direct adopters to call or email the adoptions department. Counselors will call the adopter to fill out the online questionnaire with the information the adopter tells them over the phone, then schedule the counseling session.

Scheduling adoption counseling appointments

- When an adoption application is submitted, counselors will either assign themselves to that adoption or a supervisor will assign them. The assigned counselor will then take on calling to

schedule the counseling session and coordinating all other pieces of the adoption process for that adopter.

- Before calling the adopter, review the questionnaire and check the person's information in all three databases. Create a person ID if one has not already been created
    - On the phone with adopter, confirm the date and time of the appointment, and ask whether they would prefer to do the appointment on the phone or on Zoom
        - For phone appointments, tell them we will call at the time, then again 15 minutes later if they do not answer
        - For Zoom appointments, we will email a link to the email address they provided 15 minutes before the appointment time. We will enter the meeting at the scheduled time and will provide a 15-minute window in case they are running late
        - Please confirm their email address and ask that they text a picture of their photo ID directly following the call
        - If they are not available at their scheduled time, the appointment may be cancelled, and the animal made available again
- Update the Remote Counseling Logbook with the scheduled appointment date and time

Remote counseling and outcomes

- Before each appointment, email blank adoption packet document and link to Zoom session (if applicable), and ask that the adopter email an image of the front and back of their photo ID
- Conduct the counseling session using online questionnaire and adoption packet as reference, fill out the logbook as you go
- Send adoption contract and DC dog license (if applicable) to adopter via DocuSign
    - Go to https://app.docusign.com/templates
    - Username: avalm@humanerescuealliance.org Password:
    - Select Templates at top middle of screen, select Use next to document
    - Enter the adopter's information and your information, select Send
- Email documents to adopter: multi-vaccination certificate, PetWatch document, PetPoint receipt, rabies certificate with signature (if available).
    - Print Report > Destination: Save as PDF > Save and email to the adopter
    - Let adopters know that tags and rabies certificate will be mailed to them
        - If animal was rabies vaccinated at NYA, you can email the rabies certificate with signature to them. Do not do this for animals vaccinated at OGL or elsewhere.
        - For those vaccinated at OGL or elsewhere, if they need paperwork sooner, please flag for on-site staff who may be able to scan the documents to email.
- Once Contracts are received, upload them to onedrive folder "Scanned Adoption Contracts"
    - Returned DCDL should be placed in folder DocuSIgnDCDL
    - Returned Unaltered Waiver should be placed in folder DocusignUNalteredWaiver
    - Returned Uri Waivers should be placed in folder DocusignURIWaiver
    - Returned Adoptions Contracts should just be placed like you normally would.
- Process payment through Square
    - Go to https://squareup.com/dashboard/terminal

    - Username: adoptionevents@humanerescuealliance.org Password:
    - Select Take a Payment button
    - Enter payment information, include name of adopter and animal in the notes section
    - Email receipt to adopter
    - Finance will pull reports from Square and PetPoint, no need to track on our end
- Once counseling is complete, let adopter know they can coordinate pick up of animal directly with the foster
- Within 24 hours before the animal is picked up:
    - Complete the Wellness Exam Certificate in DocuSign and send to adopter
    - Submit outcome
    - Download and email the 24 PetWatch document to the adopter