Adoption Processing Quick Guide

Process an Adoption in 5 Easy Steps

1 Start the Checkout

Complete the adoption as normal in your software. The Send Link button will auto-populate for you.

Tip: Confirm adopter contact information before sending. An accurate phone number and email address are essential for lost-pet reunification.

2 Customize the Adoption

Choose what to include in the checkout experience:

- Adoption contract
- Medical records or care documents
- Photos or additional resources
- Donation asks
- Payment amount/details
- Internal transaction category/cash drawer

Remember: You can set this up to auto-populate, saving time.

Tip: This is the opportunity to ensure any files you don't want shared with the adopter are unchecked.

3 Send the Checkout Link

Choose the method that works best for the adopter:

- Text Message
- Email
- Copy link to shelter tablet or computer
- QR Code

Best Practice: Ask the adopter which option they prefer.

4 Guide the Adopter Through Checkout

The adopter will:

- Review their information
- Sign agreements digitally
- Optionally donate to your organization
- Review optional pet insurance coverage to help protect their new pet
- Submit payment, if utilizing an integrated payment processor, or in whatever process you have today.

Did you know that over 70% of pet owners face unexpected vet bills in their first year of ownership? Pet insurance can help keep pets with their families.

5 Complete the Adoption

Once payment is processed:

- Adoption records update in your software
- Signed documents are emailed automatically
- Microchip registration information is emailed automatically
- Adoption complete!

Tip: Remind pet parents to check for the email from PetPlace and log in to confirm their information, including any additional emergency contact details.

Frequently Asked Questions

What if the adopter does not receive the link?

- Verify their phone number or email address
- Resend the link
- Use a QR code or tablet or web browser as an alternative

Can I add or remove documents after sending the link?

Yes. Have the pet parent close out of their current link. Click the Send Link arrow in Outcomes again and resend if needed.

What payment methods are supported?

- Credit/debit card payments through supported payment processors
- Organizations may also process payments outside the platform

Does the adopter need to complete checkout on their own phone?

No. Checkout can also be completed on a shelter computer.

What is the pet insurance offer during checkout?

Adopters can enroll in Pets Best Pet Insurance during checkout to help prepare for unexpected pet medical expenses and make confident health decisions for their new pet.

Who is Pets Best?

Pets Best has been offering simple, affordable, low-risk pet insurance options for pet parents since 2005. Insurance plans from Pets Best reimburse pet parents for eligible vet bills when pets encounter an unexpected accident or illness.

We already have a pet insurance option to adopters. Why should we offer another?

Offering adopters multiple pet insurance options provides them with greater coverage choices and price points so they can choose the plan and price best for them.

Does the adopter need to enroll in pet insurance during checkout?

No, pet insurance is optional, however, pet insurance from Pets Best is one option that is simple, affordable, low-risk option for pet parents. Adopters can enroll in a 30-day new policyholder trial with a 100% refund for unused policies cancelled within 30 days*. Pet insurance is quick and easy to share during checkout, and helps adopters protect themselves from unexpected pet medical costs and supports long-term pet retention.

*The 30-day trial is not available in all states and may vary in duration. In eligible states, you can cancel within 30 days for a full refund, provided no claims have been paid. Cancellation voids the policy, and any pending or unsubmitted claims will be denied.

Are donations required?

No. Donations are optional for adopters.

What if the adopter closes the checkout page?

Reopen the original link or resend it. The link is valid for 24 hours.

When are adoption documents sent?

Documents are automatically emailed from PetPlace after checkout is complete.

What if the payment fails?

1. Ask the adopter to retry their payment method
2. Confirm payment processor connectivity
3. Use an alternative payment method if your organization allows it

Can adopters review pet insurance later?

Yes, adopters can opt to receive their insurance quote via email for later review. Team members should still encourage adopters to consider pet insurance options when planning for their pet's future.

Quick Reminders

- Keep adopters informed throughout the process
- Double-check contact information before sending
- Encourage donations with a friendly conversation
- Stay nearby to support adopters during checkout
- Celebrate the adoption experience!

To learn more about Pets Best pet insurance scan the QR code.

For terms and conditions visit: https://www.petsbest.com/policy. Products are underwritten by American Pet Insurance Company (NAIC #12190), Independence American Insurance Company (NAIC #26581), Independence Pet Insurance Company (NAIC #17543), or MS Transverse Insurance Company (NAIC #21075) and administered by Pets Best Insurance Services, LLC, (NPN #8889658, CA agency #0F37530).

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