

# GIS and Historical Licensing Data Explained



How and why DocuPet uses GIS and Historical Licensing Data in order to launch your program.



# Table of contents



- Overview
- GIS
  - How We Use It
  - Our Template
  - Considerations
  - Our Process
- **Historical License Records (HLD)**
  - How We Use It
  - Our Template
  - Common Errors to Avoid
  - Definitions
  - Considerations
  - Our Process



# Overview

Historic Licensing Data (HLD) and GIS parcel data are essential components for launching with DocuPet. Both datasets must be provided prior to implementation, as they are reviewed to ensure accuracy and completeness and to help determine a realistic soft launch date.

To support your program effectively, we request 3–5 years of licensing records. Following your soft launch, a second HLD file (referred to as the **Delta Data file**) must be submitted to capture all sales and license updates between the initial data export and go-live.

DocuPet will provide templates for both HLD and GIS data. All data should be submitted using these templates to ensure accurate interpretation and a smooth transition into the system.





# GIS How We Use It

## **Place Pet Owners in the Correct Jurisdiction**

DocuPet partners with many communities across North America, including those serving multiple jurisdictions. GIS data ensures pet owners are placed in the correct licensing program, especially important when neighbouring communities are also DocuPet partners. If a pet owner moves between partner locations, they can retain their account (but not their license).

## **Confirm Deliverability**

As all tags are delivered via regular mail, GIS data used in combination with our USPS address validation tool helps ensure successful delivery of packages and renewal letter communications.

## **Support Canvassing Efforts**

The DocuPet canvassing system relies on GIS data to map all addresses within your community and build efficient routes. For best results, this data should be as complete and up to date as possible.





# GIS Our Data Template

To ensure GIS data is uploaded correctly and interpreted accurately, we ask that all data be provided using the DocuPet template.

Following the template helps reduce errors during processing and improves the accuracy of the address database.

The GIS template includes all required fields needed to accurately map addresses. Records missing required fields, or those outside of the licensing region, may be deemed unimportable.

Shapefiles are accepted; however, they must include all required fields.

Please note: it is the partner's responsibility to ensure all data provided is accurate, complete, within the licensing region, and ready for processing by DocuPet.





# GIS Considerations

Before submitting your completed file, please confirm the following:

- Do you have any questions or concerns with the required fields?
- Does the data include the jurisdiction (not just city and postal code)?
- Do you plan to run door-to-door canvassing programs? If so, latitude and longitude are required.
- How often do you anticipate needing to provide updated data?

DocuPet can refresh the address database at any time (e.g., new subdivisions). Please allow several weeks for processing.



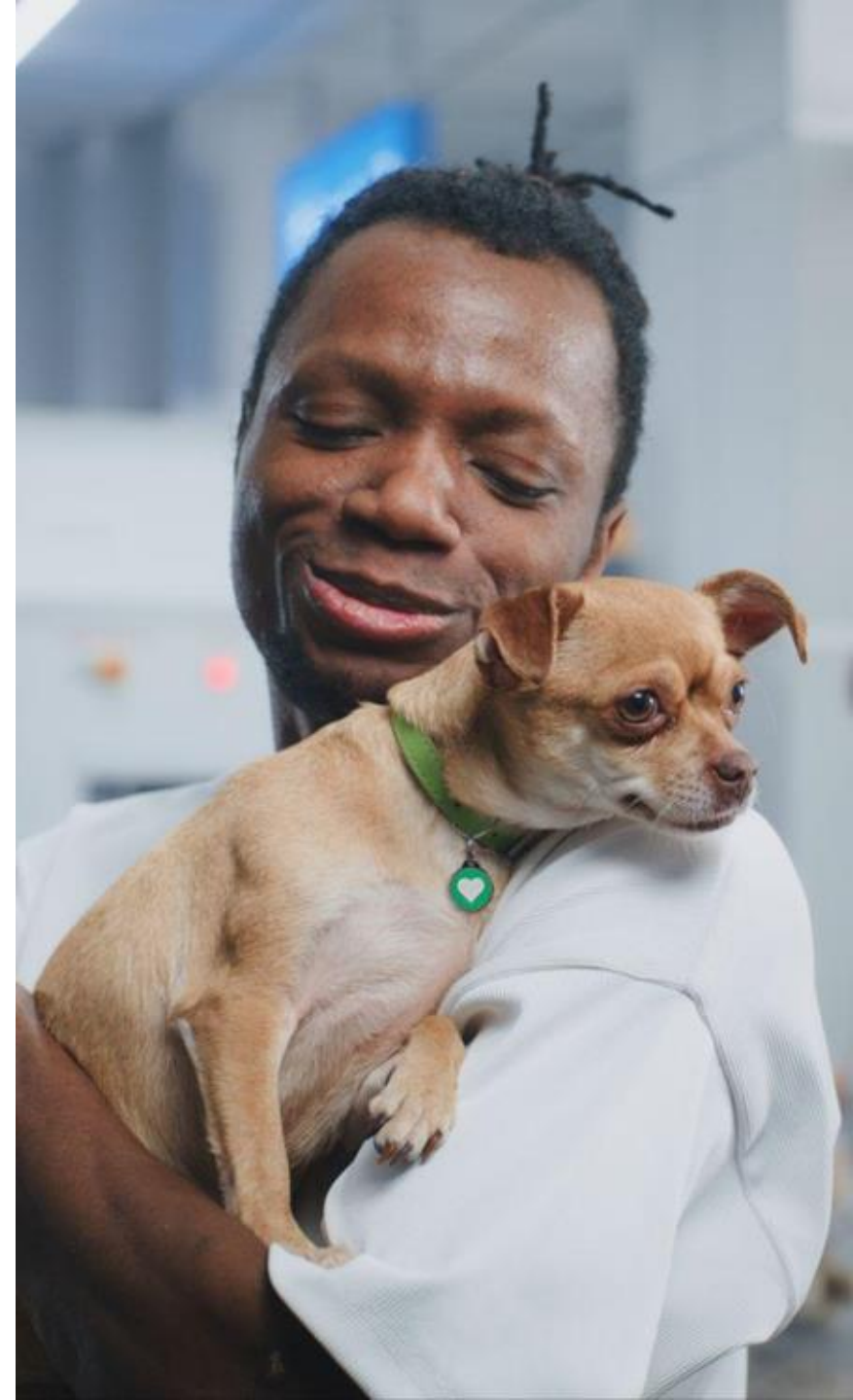


# GIS Our Process

Once the GIS data has been provided using the template, it is run through an address validation tool to confirm deliverability, apply corrections, and generate a list of unimportable addresses. This list is shared with the partner for review in case corrections are required.

Once the Historic Licensing Data is imported, the GIS data is uploaded and a match rate is calculated against pet owner addresses. If the match rate is above 85%, address validation may be enabled, meaning a valid address must already exist in the DocuPet system for a pet owner to license. This helps ensure pet owners are licensing in the correct community.

If the match rate is below 85%, alternative options will be reviewed, such as using zip codes to assign jurisdiction or automatically assigning pet owners based on the licensing site they use, regardless of the address entered.





# HLD How We Use It

## **License Sales Targets**

Historic licensing data is used to establish month-over-month license sales projections.

## **Pre-populate Records**

Accounts are created for all historic records in an “offline” status. DocuPet generates and distributes unique activation codes to pet owners, allowing them to access their account using their activation code and associated postal code. The system also helps prevent duplicate accounts by identifying existing pet records at the same address.

## **Renewal Communications**

Based on a pet’s license expiration date, automated communications (email, phone, and mail) are triggered when a pet is within 45 days of expiry. The Delta Data file is required at soft launch to ensure all data is current and complete. This allows communications to be activated immediately and supports early capture of license sales





# HLD Our Data Template

In order to effectively upload HLD data into the DocuPet system and ensure accurate interpretation, we require that our provided template be used.

Using the template structure helps reduce processing time and minimizes the potential for errors during formatting and data manipulation. The template includes all required fields necessary for importing historic licensing data, along with guidance on the preferred format for each data point.

Any records missing mandatory fields will be deemed unimportable.

Please note that if a submitted data file contains errors or incorrect information, additional fees may be incurred to correct and reprocess the data. It is the partner's responsibility to ensure all data provided is accurate, complete, and ready for processing by the DocuPet team.





# HLD Common Errors to Avoid

Based on our experience, the following are common issues identified in historical licensing data submissions. Please review the items below prior to submission to help ensure a smoother and faster upload process:

## Licenses

- Incorrect license duration or expiry dates based on start and end dates
- Missing rabies vaccination expiry dates (if applicable to your program)

## Pet Owners

- Inclusion of pet owners outside your jurisdiction or service area
- Missing birth dates or senior citizen indicators (if senior rates apply)
- Missing assigned jurisdiction (for multi-jurisdiction programs)

## Pets

- Missing tag numbers or incomplete tag formats (including prefixes)
- Missing sterilization status (if spay/neuter requirements apply)
- Missing pet flags, including service animal, dangerous dog, etc.





# HLD Definitions (Pet & Pet Owner)

DocuPet uses standardized language to define the status of HLD records, and your existing program language must be translated accordingly in the submitted file. If you are unsure of a status translation, please contact your Partner Success Manager.

## Pet

- **Active** - Current pets not deceased, missing, surrendered, or given away
- **Removed** - Previous pets deceased, missing, surrendered, given away, or other (won't say)

## Pet Owner

- **Active** - Current pet owner not marked as deceased, returned mail, out of licensing region, or with out of date address information
- **Inactive** - Current pet owner marked as deceased, returned mail, out of licensing region, with out of date address information, and/or other

Continued on next slide.

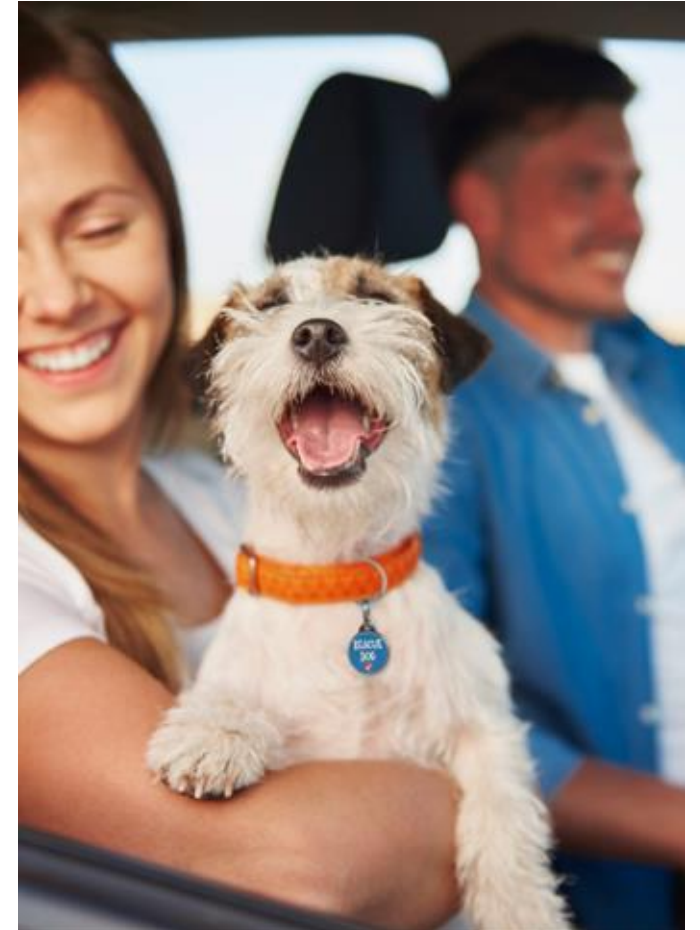




# HLD Definitions (License Status)

## License Status

- **Active** - license not otherwise temporary, incomplete, suspended or cancelled
- **Temporary** - license with a full duration with a clause (often sterilization or rabies expiration related)
- **Incomplete** - license with a full duration with a clause (often payment related) that is not otherwise valid
- **Suspended/Cancelled** - license rescinded or invalidated (often refund related)





# HLD Considerations

Before submitting your completed file, please confirm the following:

- Are all required fields included?
- Does the data include only licensing records (no microchips, boarding, adoptions, etc.)?
- Are only licensable species included (cats and dogs)?
- Does the data include all active licenses (including specialty licenses)?
- Are only active pets included? If deceased pets are included, are they clearly identified?
- Are only active pet owners included? If inactive owners are included, are they clearly identified?
- Are addresses fully formatted (unit number, house number, street direction, street name, city, and postal code)?
- Does the data include only current mailing and physical addresses? If historical addresses are included, are they clearly identified?
- Are there any known inaccuracies or issues within the dataset that DocuPet should be aware of?
- What are your team's biggest concerns regarding the data (e.g., accuracy, duplicate accounts, missing information)?



# HLD Our Process

1. Once data is collected and formatted in our template, it should be sent via a secure method (e.g., FTP or Dropbox, provided by DocuPet)
2. Once the data pre-review is approved by our Data Team, the implementation process typically takes 6–8 weeks
3. Data is processed on encrypted systems only and securely deleted once processing is complete
4. Data is reviewed for import readiness, including field formatting, completeness, and accuracy
5. All address records are run through address validation software to ensure consistent formatting and improve matching to GIS and civic address data
6. A data count is completed to establish finalized baseline figures
7. Any unimportable records are shared with the partner for review and correction
8. Data is imported into a staging environment and testing is completed
9. A sample review file is shared with the partner to confirm successful import
10. Data is then imported into production prior to launch
11. After soft launch, the Delta Data export and any corrected unimportable files must be provided
12. Once these files are processed, renewal communications can be activated for pet owners



# Any Questions?

Contact the DocuPet Team to  
find out more.

