

# Operational Considerations



A brief explanation of key operational considerations for your organization when launching with DocuPet.



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# Overview

DocuPet recognizes the importance of pet licensing. We are committed to supporting the modernization and accessibility of pet licensing services across North America. DocuPet will work in partnership with your organization to encourage existing licensees to activate their accounts and renew any expiring licenses online through the DocuPet platform.

As staff becomes more familiar with the DocuPet system and processes, your organization will realize significant time and cost savings related to licensing administration and associated customer service support.

When partnering with DocuPet, there will be operational changes designed to make the day-to-day tasks of your organization easier and more efficient. This deck outlines key operational considerations to help you prepare for launch, including how the system will interact with your current workflows and any potential SOP updates needed prior to go-live.





# Internal Considerations

With the transition to the new licensing system, your organization will need to determine how staff will handle the following circumstances, where applicable:

- How will you handle missed temporary license windows? (if applicable)  
*e.g., If a pet owner misses the document submission deadline but is within 30 days of the window → manually extend the deadline OR require purchase of a new license*
- Who will approve document submissions (if applicable)
- Who will have access to adding new addresses to the system (Authoritative Address tool)
- Who will be responsible for opening returned mail and flagging accounts as returned mail

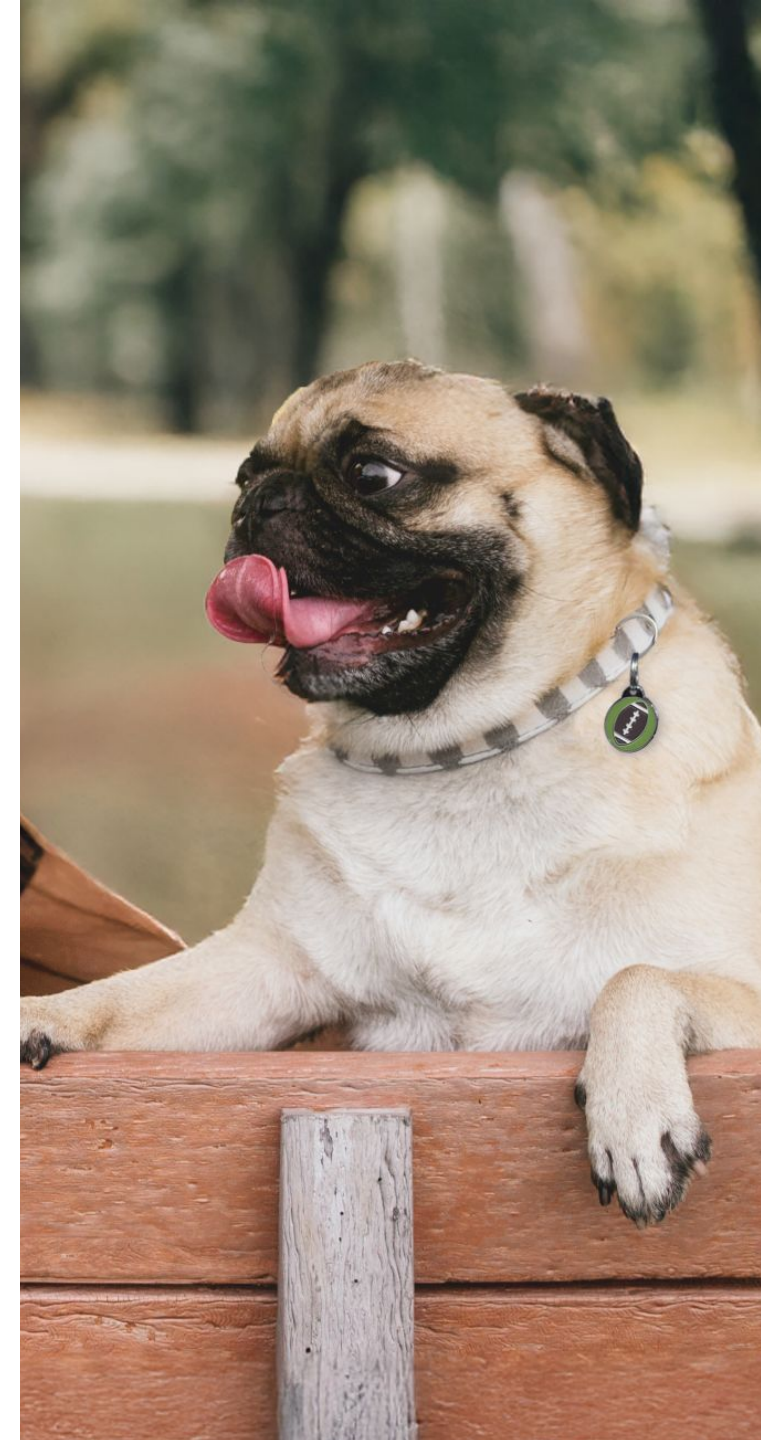




# Staff Considerations

DocuPet highly encourages each organization to designate one to three “gurus” who will become the primary experts on the DocuPet system. We recommend these individuals act as the main internal resource for:

- Training new staff on the DocuPet system
- Managing admin accounts (adding and deactivating users)
- Assigning appropriate user permission levels
- Ensuring departing staff accounts are promptly deactivated to protect sensitive pet owner information
- Handling unique pet and pet owner scenarios as they arise
- Serving as the escalation point of contact for DocuPet when internal questions require additional support





# Training Considerations

Providing staff with the **Implementation Plan** is a valuable resource to help ensure a clear understanding of the solution built for your organization.

All staff will also have access to the [HelpDesk](#), which contains a wide range of resources designed to support day-to-day use of the DocuPet system and answer common questions. Additional training resources will also be available through [DocuPet's Certification Program](#) after launch, allowing your team to refresh skills or onboard new staff as needed.

For items that cannot be resolved through the HelpDesk, additional support is available through our Administrative Support team.

Administrator Support: ✉ [support@docupet.com](mailto:support@docupet.com) ☎ 1-855-224-2481

Customer Support: ✉ [info@docupet.com](mailto:info@docupet.com) ☎ 1-877-239-6072



[Home](#)

[Pet Owner Record Search](#)

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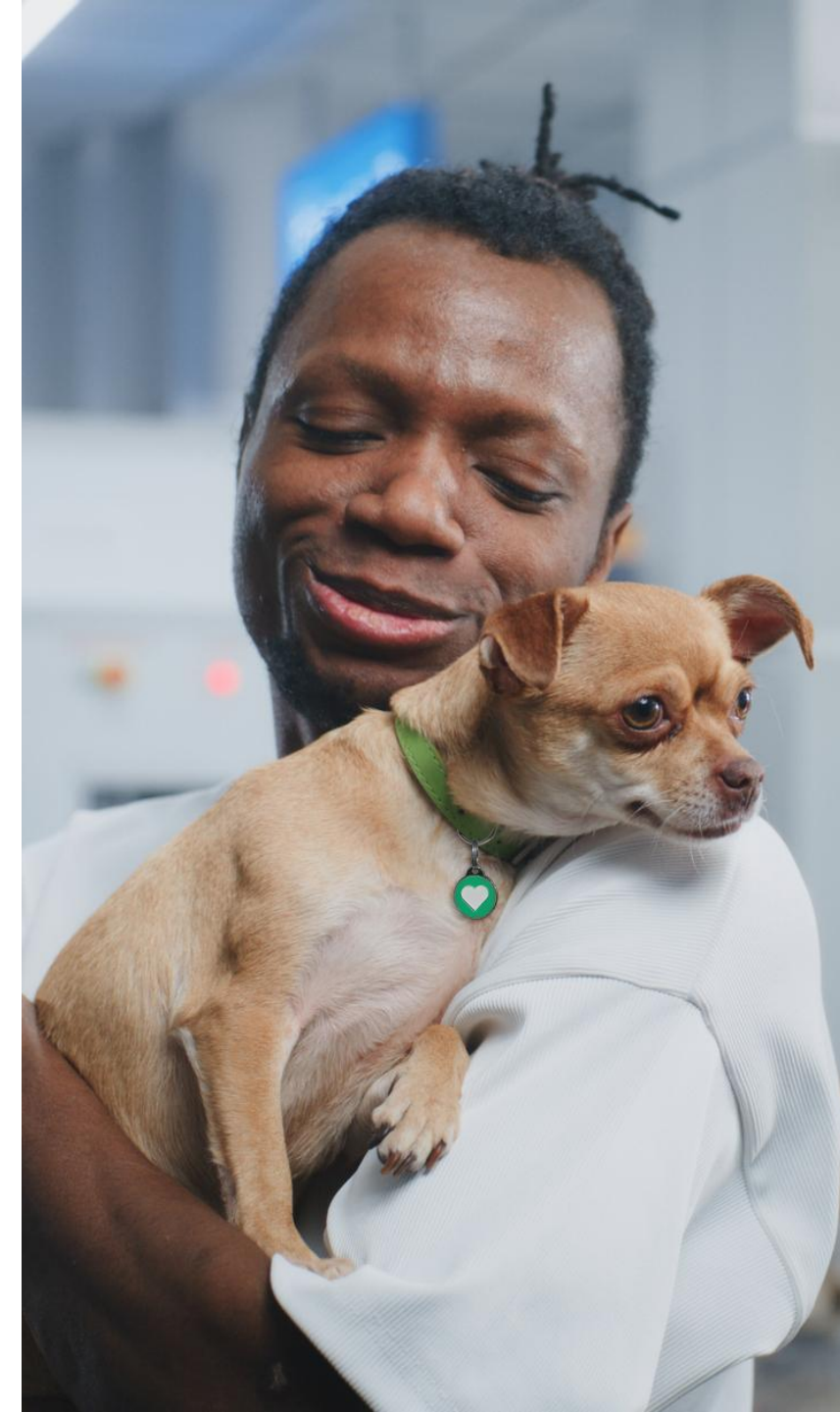
# Address Considerations

The DocuPet system relies heavily on GIS addressing and postal code data to direct pet owners into the correct licensing environments.

During implementation, your organization provided GIS records for your community(ies). However, no GIS dataset is ever 100% complete (particularly with new developments), so you may encounter addresses that are not recognized as “valid” in the system.

This means the address is not included in the GIS data set associated with your organization.

In these cases, administrators may need to manually add addresses using the [Authoritative Address \(AA\) tool](#), which allows the pet owner to proceed with licensing under your organization.





# Address Considerations

The DocuPet system requires an exact match to an existing AA record. For example, “Drive” and “Dr” must match exactly for the address to be recognized.

We strongly encourage staff to use the auto-populated dropdown whenever possible and ensure all options are exhausted before manually adding a new address.

For instructions, please refer to the [AA guide](#) available in the HelpDesk.

We also recommend that organizations establish internal policies for adding addresses to help prevent duplicate entries and ensure licensing is correctly assigned to the appropriate jurisdiction.





# Administrative Support

Once the system is live, if your team is unable to find an answer in the [HelpDesk](#) or the inquiry requires DocuPet's involvement, our Administrative Support team is available via a dedicated phone line and email.

Please contact Administrative Support for the following:

- Processing refunds for orders paid through DocuPet's payment processor (Stripe)
- Adding a vendor for a new admin user (to restrict visibility to their own sales)
- Correcting orders
- Changing the sale admin/vendor on an order
- Updating the payment type on an order
- Cancelling an order, if required





# Administrative Support

Our Administrative Support Team is available:

- **Monday–Friday: 8:00 AM – 8:00 PM EST**

**Email:** [support@docupet.com](mailto:support@docupet.com)

**Phone:** 1-855-224-2481

**Please note:** These contact details are for administrative use only and should not be shared with pet owners, as they have their own dedicated Customer Care team for support.





# Pet Owner Considerations

We make the transition for your community to DocuPet as seamless as possible.

DocuPet's customized web experience for your organization serves as a one-stop shop for residents to learn about licensing and complete their registration online. This is especially helpful for organizations with limited in-person hours, allowing pet owners to renew and purchase licenses conveniently from home.

That said, it is important to remember this is a new system for pet owners, and they may have questions about navigating the site or completing the licensing process.





# Pet Owner Accounts

Prior to launch, multiple years of licensing data were provided by your organization and uploaded into DocuPet, creating accounts for pet owners. This allows administrators to easily search accounts within the new system and enables pet owners to license their pets without needing to create a new account.

Once a pet owner has activated their online account, they can update most account and pet information online. However, name and age cannot be changed, and special designations (such as service animal, veteran, or disability) must be applied by an administrator or in person. Some updates may also require assistance from DocuPet Customer Care.

For more information on DocuPet policies, please refer to the **Implementation Plan**.





# Customer Care

DocuPet has a dedicated Customer Care team available to support all pet owners.

Support is offered in three ways: phone, email, and live chat (available directly on the website during the licensing process).

## Customer Care Availability:

- Monday–Saturday (excluding holidays): 9:00 AM – 9:00 PM EST
- Sunday: 11:00 AM – 7:00 PM EST

**Email:** [info@docupet.com](mailto:info@docupet.com)

**Phone:** 1-855-249-1370





# Renewal Communications

DocuPet will manage all license-related communications to pet owners through automated reminders delivered by email, mail, and phone. These communications are designed to increase renewal rates and encourage online licensing.

DocuPet messaging is continuously tested and optimized for performance and is tailored based on a user's account status, helping guide pet owners to complete their licensing online.

We strongly encourage organizations to collect email addresses wherever possible, as this enables more touchpoints and improves the ability to support timely renewals.

For more information on communications, please refer to the **Implementation Plan**.





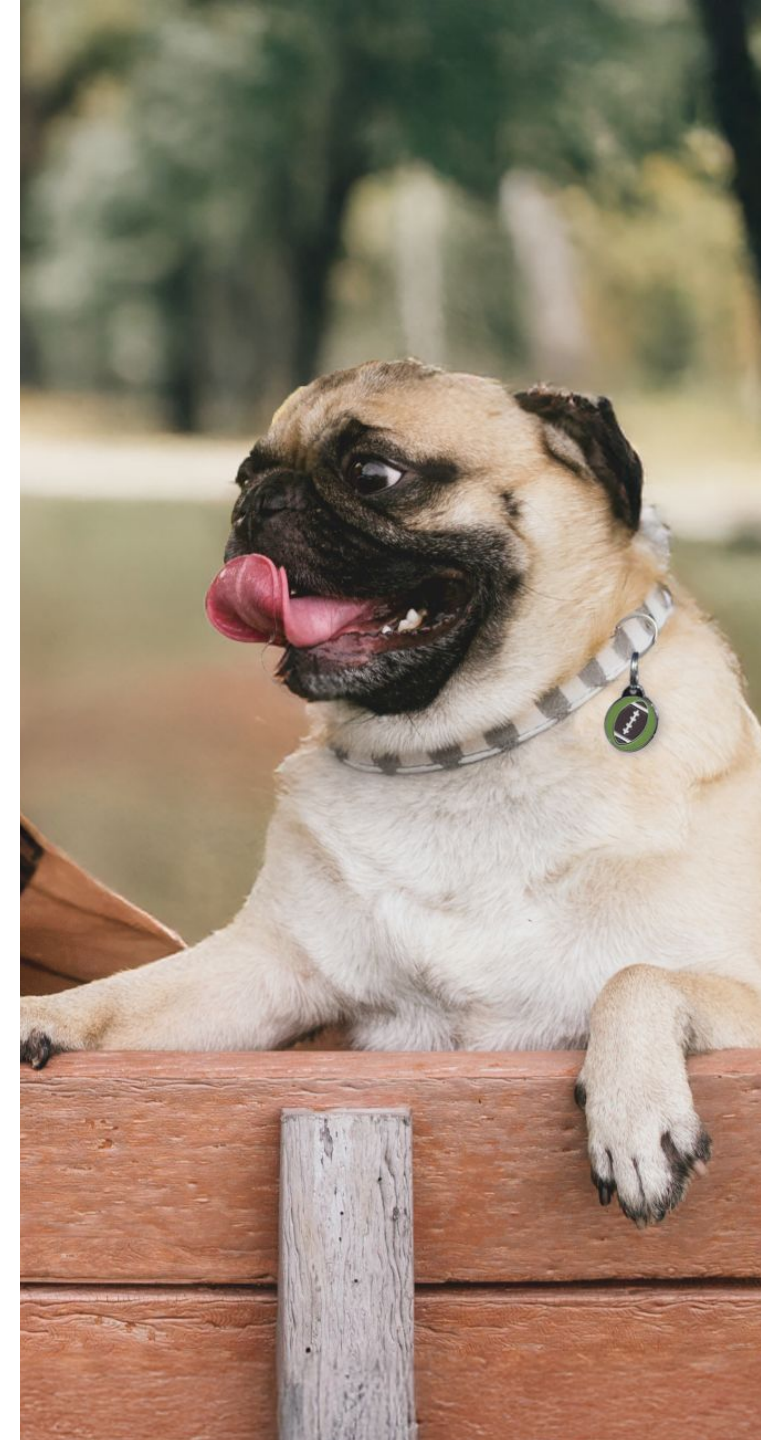
# Return Mail Considerations

To reduce confusion within the community, DocuPet includes your organization's logo and address on all letter communications sent to pet owners. As a result, any returned mail will be sent directly to your organization.

It is important to process this mail and flag the pet owner's account as "[returned mail](#)" so that:

- Your team has visibility if a pet owner inquires about missing communications or disputes a late fee
- DocuPet does not continue sending mail to an invalid address

Once the address has been updated and validated, the returned mail flag will be automatically removed and DocuPet will resume sending letter communications.





## DocuPet Tags

All license tag fulfillment will be managed by DocuPet and shipped from our Syracuse office. Whether licensing online or in person, pet owners can expect to receive their tag by mail within 7–10 business days. In the meantime, proof of license is available through their online account.

Pet owners have the option to personalize their standard HomeSafe tag or upgrade to one of DocuPet's designer tags. After receiving their first free lifetime DocuPet tag, they may continue using the same tag each year or request a replacement at the standard tag fee during future renewals. Replacement tags can also be ordered at any time.

Tags that are significantly worn or damaged will be replaced by DocuPet at no cost to either the pet owner or your organization.





# DocuPet's HomeSafe™ Program

[DocuPet's HomeSafe™ program](#) is provided as a complimentary service to all licensees who agree to our terms of service. Pet owners who register or activate an online account can opt into community lost pet alerts to stay informed about lost or found pets in their area.

DocuPet's Customer Care team is also available 24/7 to support reunification efforts, helping return lost or found pets to their owners—an important benefit to highlight when promoting licensing to residents.

Each tag issued is assigned a unique lifetime ID number, which serves as the pet's HomeSafe® code. For pet owners who upgrade to a designer tag, this same unique code is etched on the back, ensuring the pet is always linked to the same profile regardless of tag type.





# Any Questions?

Contact the DocuPet Team to  
find out more.

