Best Practices for Accessions in ZIMS

Contact Species360 Support

An Accession is recording a new animal or group into the ZIMS database. An individual animal or group of animals is accessioned only once into the ZIMS application. This accession is done by the first Species360 member who is the holder of the individual/group or is the owner when the individual/group is held at a non-Species360 facility. Subsequent Species360 institutions that hold/own this individual/group will create Visits within the record that already exists in the ZIMS application.

You can accession six different entities into ZIMS:
1. Individual Animal – an single animal that can be identified in some way
2. Group of Animals – multiple animals (usually of the same species) that are not individually identifiable
3. Egg – a single egg that can be identified in some way
4. Egg Mass – many eggs usually held together by a gelatinous substance, too many to accurately count
5. Fetus – stage between embryo and birth
6. Group of Eggs – multiple eggs that can be counted but are not individually identifiable
7. Incomplete Accession – a bare-bones accession that allows data entry before a full accession is created

Best Practice Hint: Accession as individuals whenever possible but they must be identifiable in some way such as a physical identifier or separate enclosure. If animals are not identifiable they should be created as a group record to avoid creating possible fiction.

An accession into ZIMS can occur in five situations. All of these are the initial entry of the record into the ZIMS database:
1. A fetus is identified or an egg is identified or laid at your facility or at a non-Species360 member facility but you have ownership of it.
2. An animal is born or hatched at your facility or is born or hatched at a non-Species360 member facility but you have ownership of it. This birth or hatch DOES NOT include the birth of an accessioned fetus or the hatch of an accessioned egg. Those situations create Events within the record already in ZIMS.
3. You physically receive or obtain ownership of an animal from a non-Species360 member facility UNLESS this animal has previously been at a Species360 member facility and they had accessioned it.

4. You physically receive or obtain ownership of an animal from a Species360 member facility but they have not recorded it into the ZIMS database.
5. You physically receive an animal from other means such as Appeared, Collected from the Wild or Rescued where the animal has not yet been recorded in the database. If, for any of these modes, the animal has been entered into the database you should create a Visit and not record another accession as that would result in duplicated records in the ZIMS database.

What animals or groups you accession will depend on your institutional policies. Generally you should accession all animals that are physically on your grounds, or those that you have legal title to but are physically elsewhere. Even specimens that are held temporarily at your facility should be accessioned, even if they are not going to become part of your facility's official collection. The reasons for this are:

1. They reside on the facility grounds and may come into contact with animals in your permanent collection
2. They are under the care and management of the institution
3. They are often generating medical data
4. If the specimens are sent to another Species360 institution there will be no gaps in the record

As always, there are exceptions. A common policy in zoological institutions is NOT to accession feeder animals, migratory birds, public drop offs that you don't keep, live rock or native animals living on grounds. However, if these animals DO become part of your collection then you will need to accession them. It is recommended that you develop an Accession Policy for your institution so that you are consistent with what you accession such as the example below of a very simple accession policy.

ABC Zoo and Aquarium Policy on Accessioning Acquisitions:
It is the policy of ABC Zoo/Aquarium that all animals that are part of the institution's collection are accessioned into the Association of Zoos and Aquariums' (AZA) endorsed animal record-keeping system. Currently this system is the ZIMS application supported by Species360.

The zoo's collection is defined as:
- any animal that is physically on the zoo grounds, regardless of location or department
- any animal that is legally owned by the zoo, regardless of physical location.

Animals shall be accessioned into the collection within twenty-four hours of arrival or receipt of legal ownership. All documentation regarding the acquisition will be maintained in the office of the Curator of Collections Management/Registrar.

The following animals will not be accessioned:
- Animals acquired as food for collection animals (mice, crickets, fish, etc.)
- Wild animals living on zoo grounds (raccoons, opossums, etc.)
- Animals trapped on zoo grounds, found injured, dropped off or donated to the zoo that are either euthanized, released, or placed elsewhere

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Best Practice Hint: Follow your Accession Policy. Otherwise you may create inconsistent records that do not accurately reflect your animal collection.

Modes of Accession

There are six different modes for accessioning an individual:

1. From Another Institution – the animal was received from another institution (either a Species360 member or non-member institution) or an individual person such as a member of the public or a private breeder.

2. Appeared – the animal simply shows up on the grounds of the institution and is not a planned transaction. Sometimes they walk, hop, crawl or fly in on their own, but in the majority of Appeared cases someone has dropped the animal off at the front gate or in an exhibit. If a member of the public donates an animal the accession mode would be From Another Institution as defined above and not an Appeared.

3. Collected From Wild – the animal is collected from the wild specifically to add to your collection.

4. Rescued - an injured or orphaned animal, usually native species, is either collected by you and brought to your institution or brought to you by someone else, usually with the end result being rehabilitation and possible release back to the wild.

5. Birth/Hatch – The animal is born or hatched. To record a birth or hatch from a recorded Egg or Fetus you would Record an Event and not create a new accession record.

6. Undetermined/Indeterminate - you do not know the mode of the accession. This is usually used for historical data entry. For example, an animal appears on your inventory that wasn't there in your previous inventory (your 1960 inventory listed 2.3 giraffes and your 1961 inventory listed 2.4 giraffes) but you do not know if the additional 0.1 was a birth or an acquisition. Undetermined means you do not know the information now but you may sometime in the future. Indeterminate means that you do not know the information now and you never will. Indeterminate means Impossible to know.

Accession Date

The date you use as the Accession Date must reflect the earliest date that your institution either:

1. Took physical possession of the animal because you have taken management responsibility for it
2. Obtained legal title to it because you have taken legal responsibility for it
3. Or both

Using any other date can result in a black hole in an animal's record where there is a time period that it is not accounted for. Or, in reverse, records may indicate that it was in two places at the same time. For animals that are collected from the wild it is recommended the accession date be the date of the collection and not the date they arrived at the zoo. This is because you accepted management responsibilities for the animal as soon as you removed it from the wild, meeting #1 above.

In addition, Collected From the Wild and Rescued require a Collection Date and Rescued Date as appropriate. The Best Practice is that these should be the same as the Accession Date, although some institution's policies do not record the Accession Date for these modes until the animal is actually at the institution. You should be consistent with your policy or you risk creating confusing and difficult to interpret data.

Best Practice Hint: The Accession Date should be the first date you either physically held the animal or received ownership of the animal.

Terms - Physical and Ownership
In ZIMS, the physical location of the individual/group and the institution that has ownership of it are tracked separately and you must record both the physical and ownership status of the accession. "Physical Only" means that you have received the animal itself, but legal ownership has not been received by you and the animal is owned by another facility or person. "Ownership Only" means that you do not physically have the animal, but you do have legal title to it. "Physical and Ownership" means that you have both the actual physical animal and the legal title to it. Recording this information incorrectly can result in incorrect search results and incorrect inventories and has the potential for great legal impact.

The Terms associated with accessions are defined when you hover over them during an accession. Make sure that you select the appropriate Term as in some accession screens what you select for the Terms will drive what subsequent fields appear for the physical and ownership information.

Best Practice Hint: Use the hover over definitions to make sure you are selecting the appropriate Term for your accession.

Local ID
For all types of accessions, except for fetuses and eggs, you need to provide a Local ID. This Local ID will change from institution to institution. You can create this Local ID any way that you like but the recommendation is just to start at 1 and go forward. Some facilities do code their Local IDs to represent taxon or year of arrival but usually this coding is not recommended as there are always situations where it falls apart and is not accurate. This Local ID cannot be repeated within the institution and it cannot be edited after the record is saved. If you are recording an Accession From Another Institution you are also required to enter their Local ID during accessioning. If it is not known you can record Undetermined or Indeterminate. In Institution Preferences you can select to auto-increment the Local ID with each accession so you do not need to track what the next number would be.

Best Practice Hint: Do not code your Local IDs. Use the auto-increment feature to

save you time!

Collection

You may not have all your animals for the same reason. Most are probably exhibit or breeding animals, but you may have some specifically for education programs. Or you may be involved with a special research project that has required you to hold the species. Your Collections are your Institution's different sets of animals that are associated with each other by the reason for having them. Most Collections can be viewed globally although some can be marked as a local only view.

Enclosure

All of your animals are placed in an enclosure within your facility. The top level enclosure is your institution and this is often the default for placing animals during an Accession. You can select a different Enclosure to be your default using My Preferences.

Parent Information

Parentage is, of course, extremely important for genetic management of the population. You have five options for recording the parentage:

- Undetermined – you do not know the parent right now but you may be able to find it out
- Indeterminate – you do not know the parent right now and you doubt that you ever will
- Wild – the parent is in the wild and usually remains so
- You know the parent is not in the ZIMS database
- Select a parent that is recorded into the ZIMS database

Hopefully you will know who the parents are. If you do not know the parentage you can select Undetermined or Indeterminate. But in most cases you can identify possible parents. Record all possible parents with their percentages of possibility. If you have unsexed animals as possible parents record them as both possible dams and possible sires. Parentage can be edited as more information is determined. If parentage is edited it is important to understand the genetic repercussions of such a change.

Best Practice Hint: Record all possible parents and adjust percentages to the best of your knowledge.

Taxonomy

For all modes of accessions you need to record the taxonomy. If you have recorded the taxonomy of the parents (last two options under Parent Information above) this will prefill with the lowest common denominator between them. If you have recorded the parents using one of the first three options above you will need to enter it manually.

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

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Taxonomy Determination

If you are recording a Birth or Hatch, the method for determining the taxonomy would be Parental. For other types of accessions you can pick from a variety of other options. This is important information to capture especially should the taxonomy come under question later.

Best Practice Hint: Take the time to record the Taxonomy Determination method. You may need to reference it in the future!

Sex

When you record the sex of an animal during an Accession you are not required to record how that sex was determined. However, should you want to change or edit that sex, a reason for the sex change is required. As for editing parentage, editing sex can have great repercussions, especially if the animal has been entered as a parent.

Life Stage

Life Stage is not a mandatory field but you may want to use it to track the development of an animal, especially if you are recording a Birth or Hatch. ZIMS will not automatically update the Life Stage as the animal matures.

Best Practice Hint: Only record Life Stage if you intend to keep it updated!

Rearing

At this time Rearing is not a mandatory field. However, this is a very important piece of data regarding the animal and should be recorded. It is recommended to do so even if you do not know the rearing type as that will indicate that you did not know it, as opposed to skipping this important field.

Best Practice Hint: Record Rearing, even if you don't know it!

Birth Information

The Birth Date, Birth Type and Birth Location are all mandatory fields for all modes of Accessions. The Birth Type (captive or wild born) is of course extremely valuable information. For captive born you will indicate the facility where the birth occurred. For wild born you can indicate a geographic location in general terms or as specific as Latitude/Longitude or GPS coordinates. This detailed geographic information can sometimes actually determine the correct species.

Mandatory fields are marked with a red asterisk. Depending on the Accession mode there are fields that are not mandatory but, if completed, will improve the record. It is recommended that you fill in all fields that you have accurate information for to make as complete an animal record as possible.

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Remember that many of the drop down lists contain definitions for the various terms if you hover your mouse over them.

The Global Accession Number (GAN) is assigned by the ZIMS application after you select to Save an accession. This number never changes even as the animal moves from one institution to another. It is like your Social Security number, it doesn't matter where you work, it stays the same. For new accessions into the application the first three digits are letters that represent the accessioning institution, the next two are numbers representing the year of the accession. The last five are sequential within the accessioning institution.

Incomplete Accessions

This functionality allows staff members who do not perform full accessions to get an animal record started so that medical records, notes, or measurements can be captured for it even before it is fully accessioned. Incomplete Accessions display on the Statistics tab in the Animal module. Once a full accession is created it can be associated with the Incomplete Accession when you Save the full accession. If the information is different you can select to save the information from the Incomplete Accession or from the full accession. All information recorded on the Incomplete Accession will be transferred into the full accession record. You can also choose to associate an Incomplete Accession with a record that has already been created by selecting Complete Selected from the Incomplete Accessions grid.

Best Practice Hint: If you do not have the information, do not create fiction by recording something simply to fill in a field. Incorrect data is more damaging to a record than no data.

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