
MEDICAL BATCH ACTIONS

Save valuable data entry time

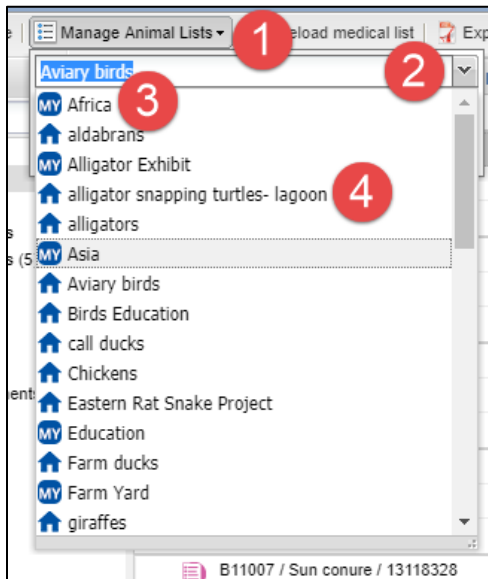
[Contact Species360 Support](#)

ZIMS has an array of options for creating batch data entry. You can enter the same information into multiple records or create different (custom) entries for multiple records. This can save valuable data entry time and can also guard against data entry errors as you do not have to perform many duplicate entries. Some of these batch actions require that you have access to some features in the Husbandry module. Talk to your Local Administrator to gain the Role access to this functionality if you do not see any of these screens. Covered here are:

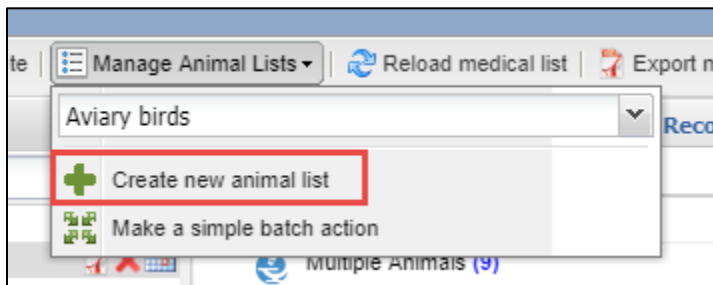
- Animal Lists
- Animal Search Results grids
- Clinical Notes from medical record
- Batch Diagnosis & Health Status
- Medical Apps – batch weight, health status and body condition score
- Medical Apps – batch data clean-up for removed animals
- Prescriptions
- Batch from Enclosure Occupants

Animal Lists

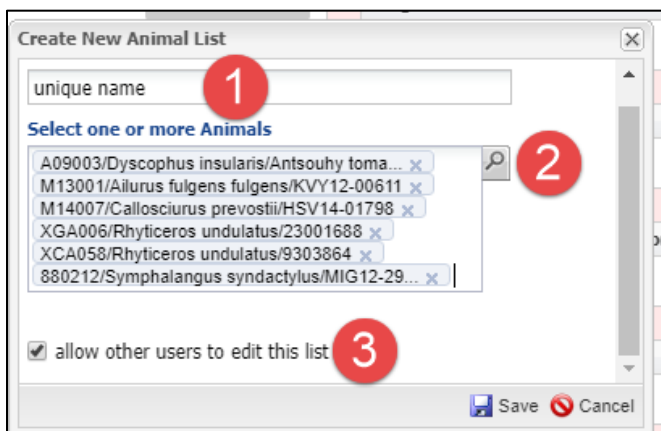
Animal Lists are static lists you create by selecting specific animal records. They can be lists of taxonomy, enclosure occupants, family groupings, etc. These lists can be created in both the Husbandry and the Medical module and available in either module regardless of their creation location. All lists can be used by all staff with the Role access but you can mark your lists so that no one else can actually edit them. These lists do not automatically update when members die, are dispositioned, or need to move out of the list for various reasons. You must maintain the list members yourself.



Animal Lists are found under the Manage Animal Lists button (1). To view/select from lists already created use the drop down arrow (2). Any lists that you have created are marked with the “MY” icon (3). Lists that others have created are marked with the “house” icon (4). You can edit your lists and you may or may not be able to edit those lists created by others.

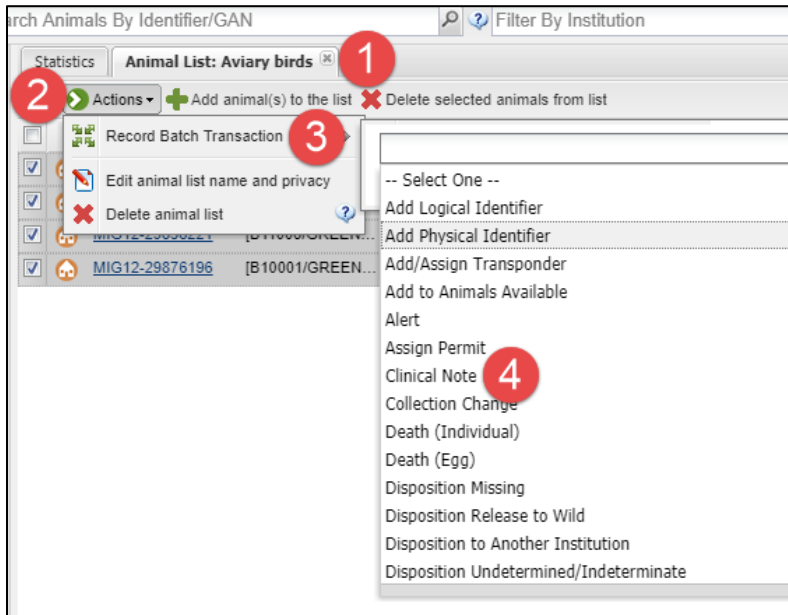


To create a new list select “Create new animal list”.

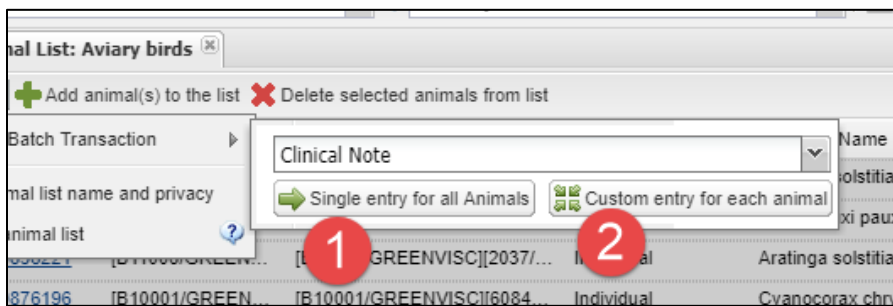


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The list name must be unique (1). If you place your initials in front of the list name they will display together when you are looking for them. To select your records type the Local ID or GAN, or use the lookup function to find them (2). By default no one else can edit your lists but if you want others to be able to edit check the box (3). Once you save the list will display.



To use the list select it from the Manage Animal Lists drop down (1). Select Actions (2) and Record Batch Transaction (3). The topics you will probably use the most are Clinical Note (4), Length Info and Weight Info.

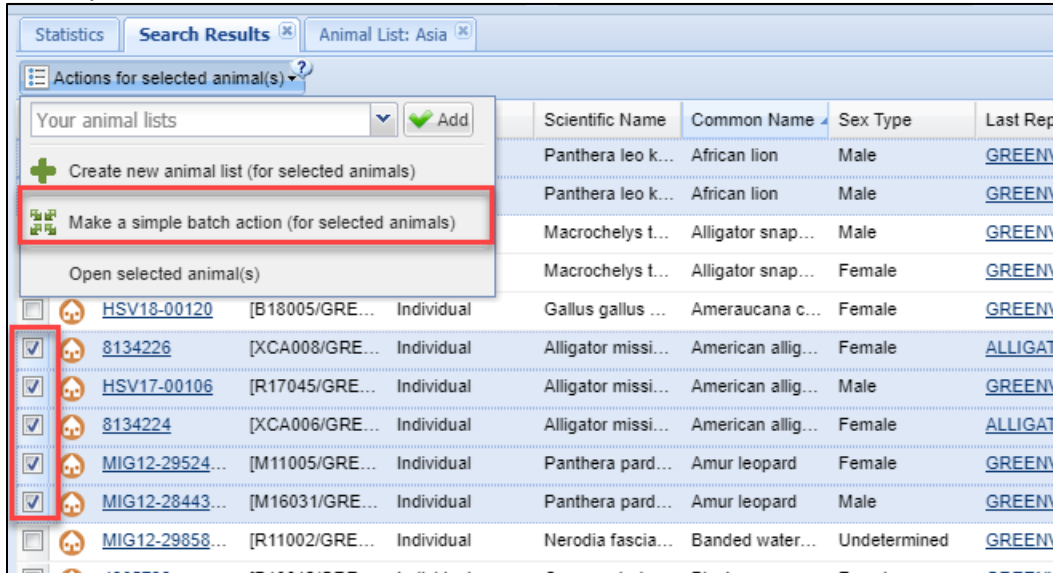


You must then decide if you want the same information to go into each record (Single entry for all Animals) (1), or if you want to record different information for each record (Custom entry for each animal) (2). Complete the screen and Save. What you recorded will go into each record as entered.

Animal Search Results Grids

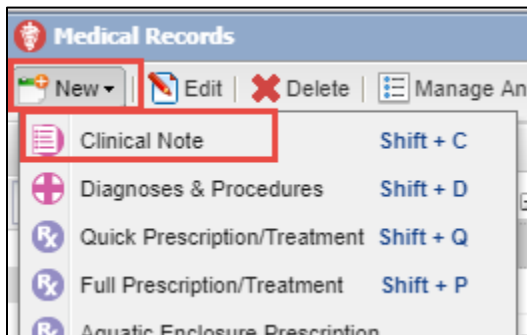
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You can also perform Batch Actions from an Animal Search results grid. Run the search and select the animals you want included. Under Actions for Selected Animals, select Make a Simple Batch Action and continue on as described above for Animal Lists.



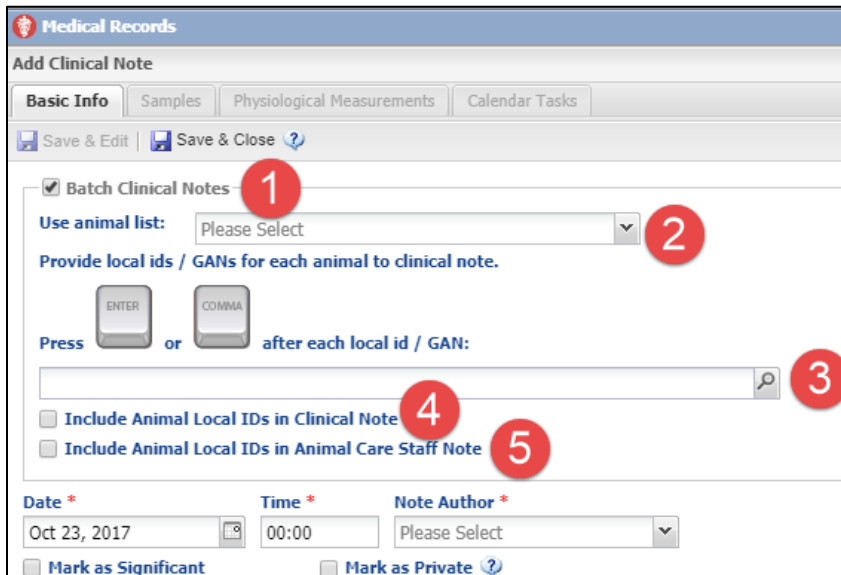
Clinical Notes – from Medical record

You can also create batch Clinical Notes from within the medical records themselves.



Select New > Clinical Note.

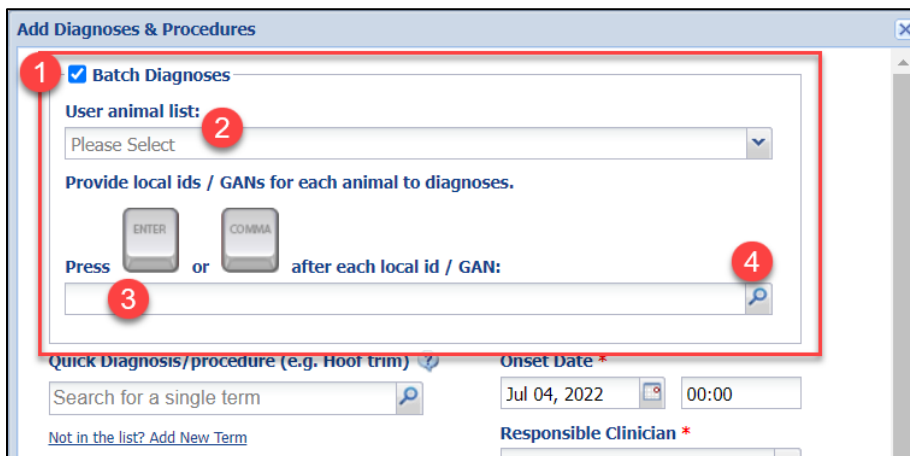
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Checking the Batch Clinical Notes box (1) will activate the ability to use one of your Animal Lists (2) or to enter multiple animals using their GAN or Local ID or the look up (3). If you want to include the Animal Local IDs in the Clinical Note check the box (4). If you want to include the Local IDs in the Animal Care Staff Note check that box. If you select to include the Local IDs in the note they will prefill into each box. It is recommended that you add your note BEFORE these IDs so the actual note displays first in the record and not the list of IDs.

Batch Diagnosis & Health Status

You can create a batch diagnosis for multiple animals using the batch functionality.

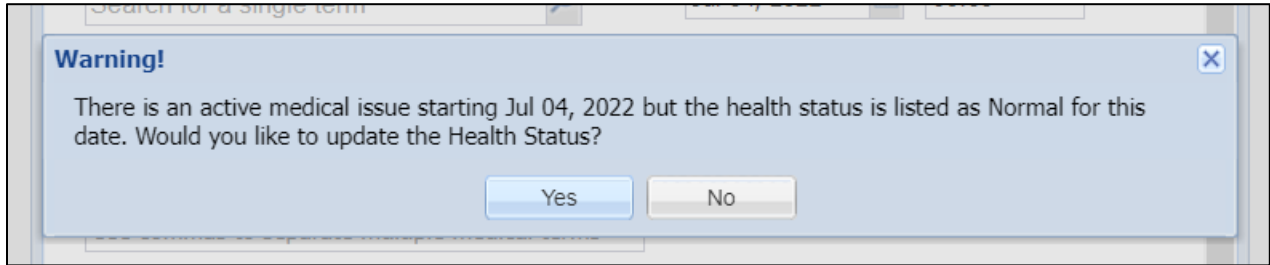


Checking the Batch Diagnosis box (1) will activate the ability to use one of your Animal Lists (2) or enter multiple animals using their GAN or Local ID (3) or use the look-up tool to find your animals (4).

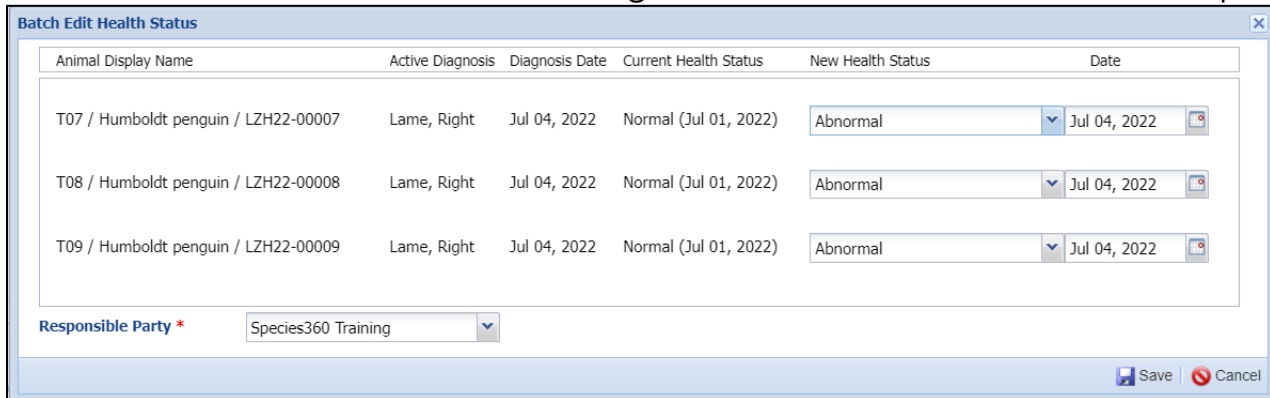
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Fill out the rest of the diagnosis box as usual (see here for [Diagnosis & Procedure help document](#)).

If the animals in your batch have a normal health status, and you record an active medical issue, a warning will pop-up asking you if you want to update the health status for your animals.



Clicking “yes” will open the batch edit health status screen, the animals from your batch that have a current health status of healthy will be in focus. You can review them, update the health status to abnormal as of the diagnosis onset date, and save with one step.

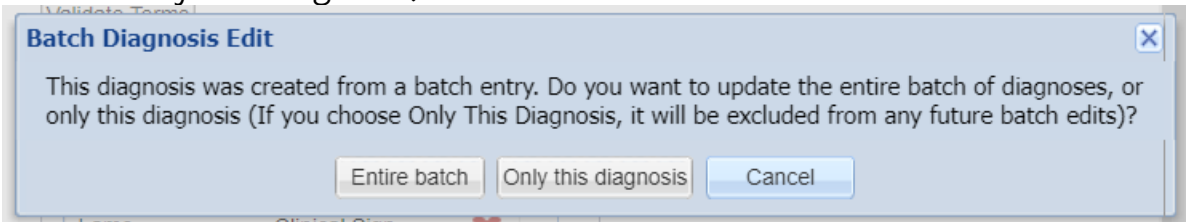


All of the diagnoses entered using the batch function will appear in the medical list as separate entries, but are still linked as a batch.

Animal	(3 Records)	Date	Details	Responsible Staff
Jul 04, 2022				
T07 / Humboldt penguin / LZH22-00007		Jul 04, 2022	Clinical Sign: Right, Lame	Species360 Trai...
T08 / Humboldt penguin / LZH22-00008		Jul 04, 2022	Clinical Sign: Right, Lame	Species360 Trai...
T09 / Humboldt penguin / LZH22-00009		Jul 04, 2022	Clinical Sign: Right, Lame	Species360 Trai...

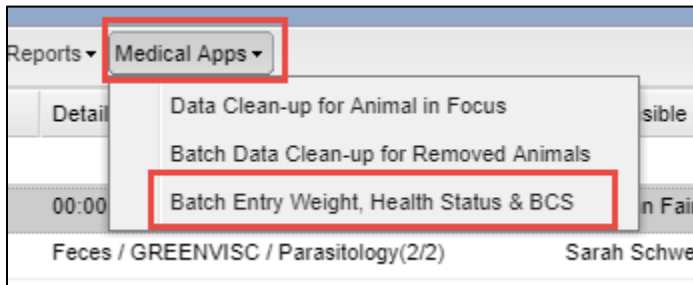
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When choosing to edit one of the entries, you can choose to split an entry from the batch and edit only that diagnosis, or edit the entire batch.

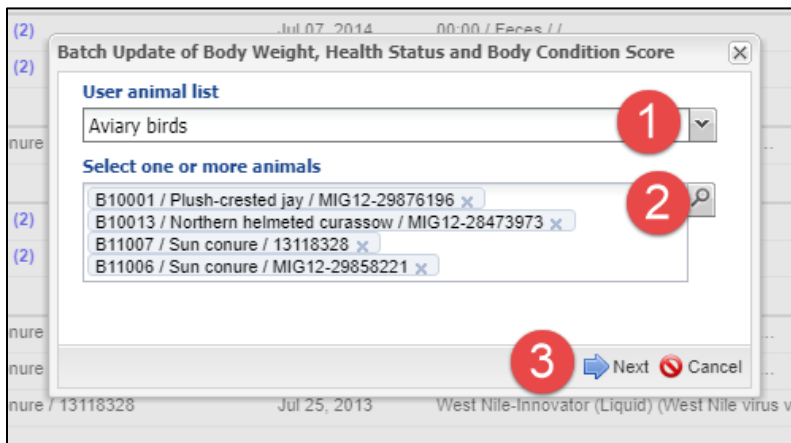


Medical Apps – batch weight, health status & body condition score

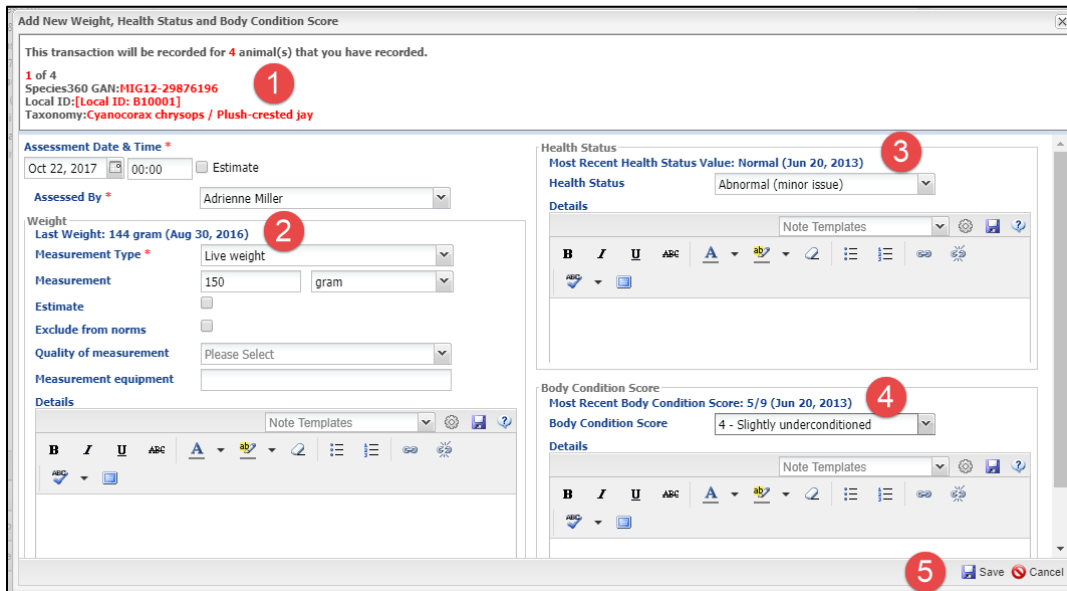
You can record batch weights and update both health status and body condition score using the Medical Apps.



Select Medical Apps > Batch Entry Weight, Health Status & BCS.



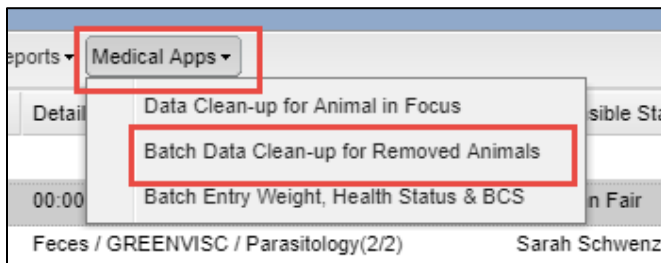
You can select an Animal List (1) which will prefill the Select animals box (2) or you can simply enter GANs or Local IDs into the Select Animals box (2). Then select Next (3).



The screen will display the number of animals you will be recording updates on and the animal information of the record you are in (1). The last weight will display (2) as well as the most recent Health Status and Body Condition Score (3 and 4). Date, Weight and Assessed By are the only mandatory fields. You do not have to update the Health Status or the Body Condition score. You also do not need to record information for every animal and you can move forward by selecting the Save button.

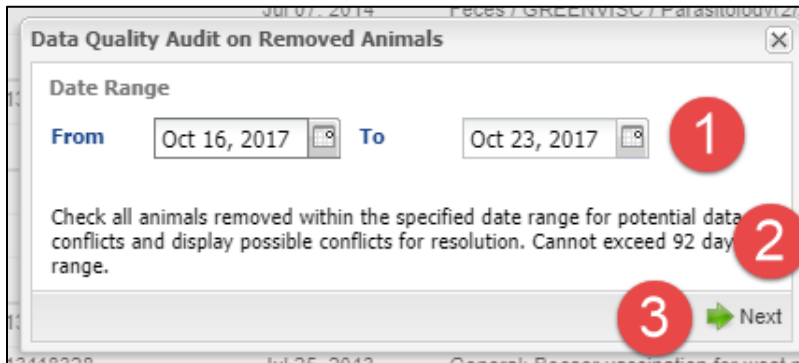
Medical Apps – batch data clean-up for removed animals

You can clean up your medical records for animals that have died or been dispositioned using the Medical Apps.

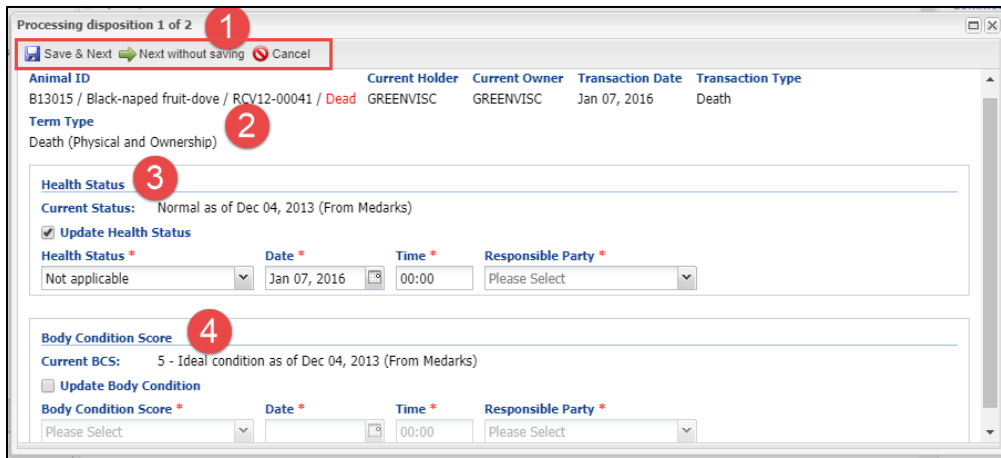


Select Medical Apps > Batch Data Clean-up for Removed Animals

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The default date range is for the last week (1) but the range can be edited as desired but cannot exceed a 92 day range (2). After setting the date range select Next (3).



ZIMS will loop through the list of animals that died or were dispositioned during the date range and check each record for potential data quality problems. The number of animals is displayed (1). The information for the animal record you are in is shown (2). In this first record ZIMS is indicating that Health Status (3) and Body Condition Score (4) may need updating. In additions ZIMS looks for:

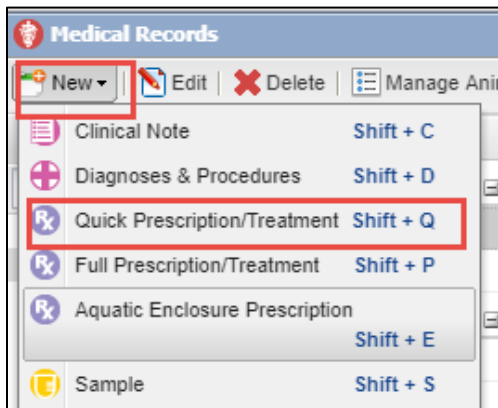
- Diagnosis records with no resolution date
- Diagnosis records with a resolution date after the disposition date
- Prescription records with an end date after the disposition date and no termination date
- Prescription records with an end date after the disposition date and with a termination date also after the disposition
- Non-pathology type calendar event after the disposition date
- Death type transaction record and a most recent health status or body condition score that is any value other than “not applicable” (as screen shot above).

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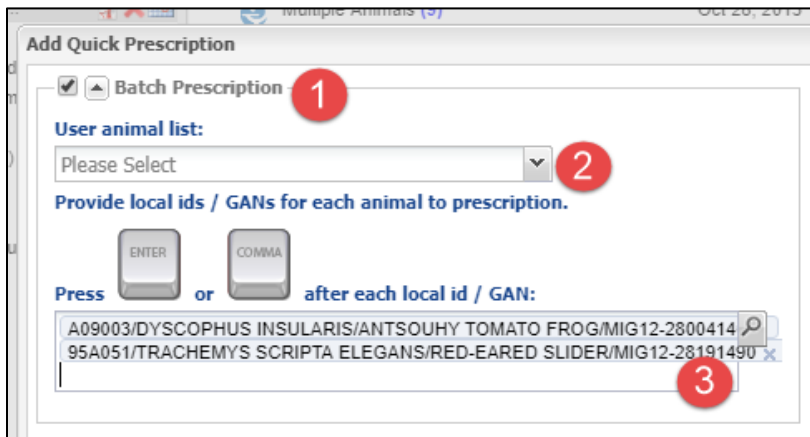
Selecting Save & Next will save your changes and move to the next record. Selecting Next Without Saving will allow you to move to the next record without making changes. Cancel will close the App.

Quick Prescription/Treatment

You can create a batch Quick Prescription/Treatment record.



Select > New > Quick Prescription/Treatment

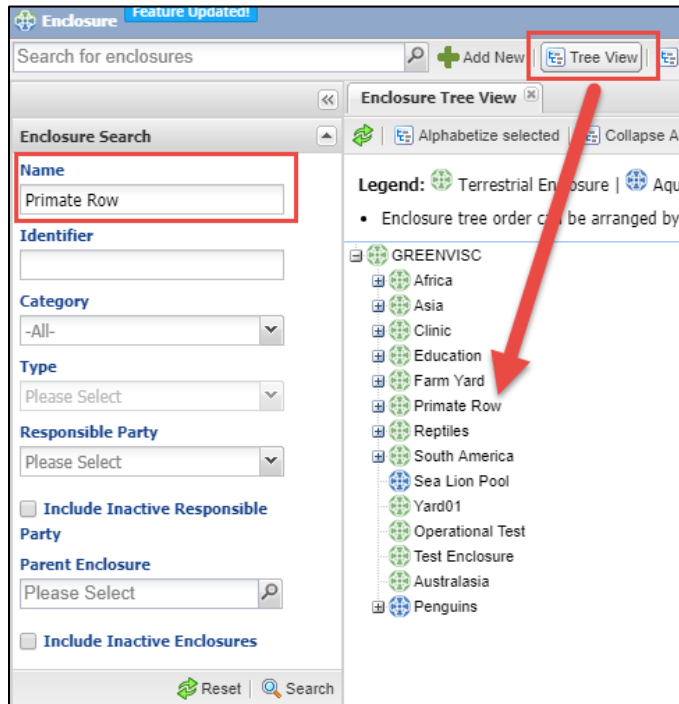


Selecting to have the Batch Prescription arrow pointing upwards (1) activates the batch screen. You can select an Animal List (2) or select animals using their GAN, Local ID or the lookup. The same Quick Prescription/Treatment will go into each record.

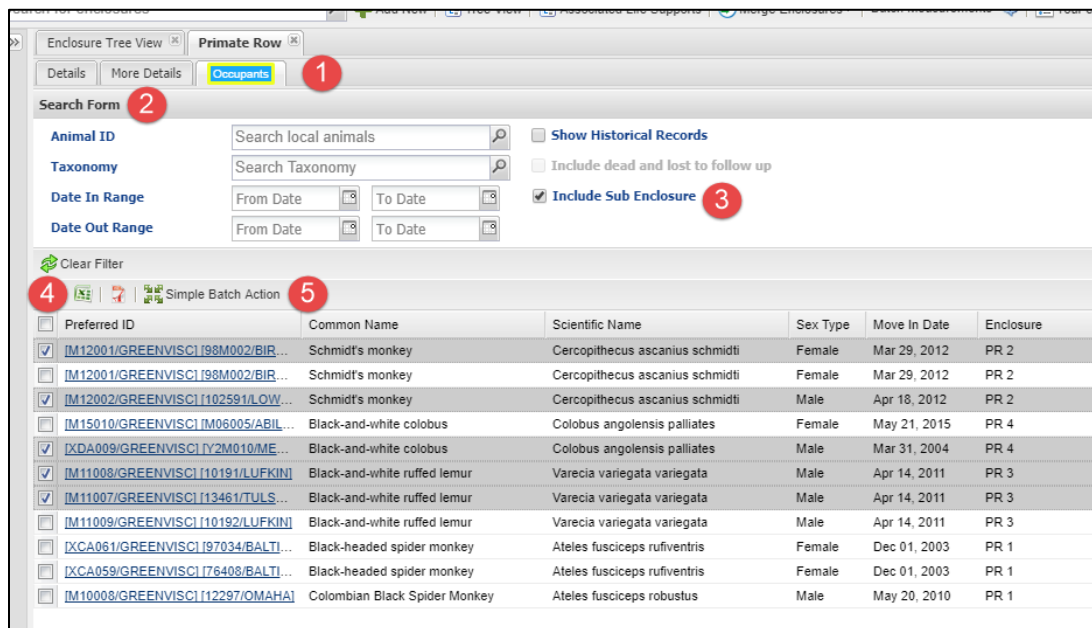
Batch from Enclosure Occupants

To record batch actions from the occupants of an enclosure you will require access to enclosures in the Husbandry module. This is a valuable functionality as the records will automatically update as animals move into and out of the enclosure, whereas an Animal List created for an enclosure does not. To open the Enclosure module select the Enclosure icon on the desktop or Start > Enclosure > Enclosure.

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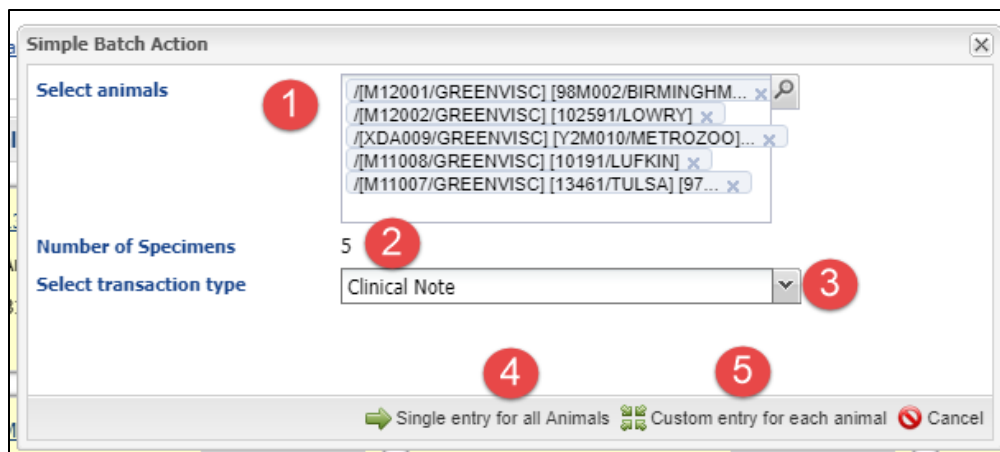


You can find the enclosure by searching for it in the Enclosure Search box, or open the Tree View and double left click on it there.

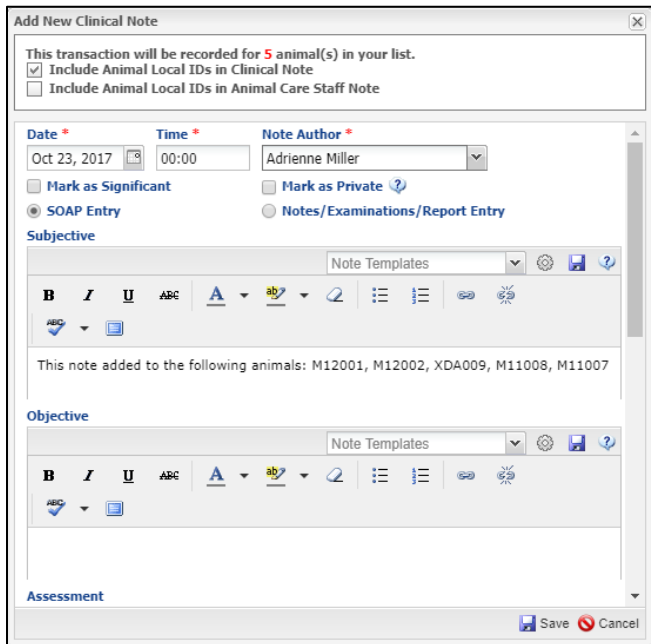


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The Occupants tab displays at the top (1). The default is current occupants but you can use the search form for past occupants by adjusting your filters (2). The enclosure we have selected (Primate Row) is an Enclosure Group (a Parent enclosure with no actual occupants, the occupants are in the child enclosures under it) so we selected to Include Sub Enclosures (3). Check the animals that you want to perform the batch action on (4). You can check all or uncheck all using the top checkbox. Then select Simple Batch Action (5).



The selected animals will display (1) and you can delete or add more from the Select Animals grid. The total number of records selected will display (2). Then select the batch action type (3) and if you want the same information duplicated in each record (4) or if you want to record different information in each record (5).



Complete the screen as desired and Save.

Revised 12 July 2022