ZIMS Medical for Non-Veterinary Staff

This guide is designed to be used by non-veterinary staff at your facility who are responsible for entering medical data into ZIMS. Many institutions do not have Full-Time Veterinary staff who can do data entry, so this responsibility often falls to the records person who understands ZIMS for Husbandry but is not medically trained. Because much of the data entered into the Medical module also goes into the Global Medical Resources, this type of data must be entered very carefully so as not to contribute inaccurate data to these resources.

Entering a smaller amount of data with integrity is much better than entering a large amount of data incorrectly.

If you are not medically trained but are responsible for entering medical data and are not sure how to do it, please Ask!!! Your support representative will be happy to help guide you. Also keep in mind your veterinarian has legal requirements for how records are entered; it's important to work closely with them to establish how medical data will be entered for your institution to align your protocols.

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Access to the Medical Module

How do I gain access to the Medical module?

- Your Species360 support representative will need to assign the Medical Admin Role to a staff member. The Medical Admin can then assign Medical Roles to other staff members. There are four Species360 template Roles, or custom roles can be created.

What access to ZIMS Medical will I have?

- That will depend on what access you need. The Medical Admin (Species360) and the Veterinarian (Species360) Template Roles are very similar with the Medical Admin having the additional access to create and assign medical Roles. A custom medical Role may be worth creating so you see only what topics you may be responsible for. Work with your Local/Medical Admin to create what access you need.

Click here for more help with Medical Roles

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Preferences

How do I set My Medical Preferences?

- My Preferences are set by individual Users and will override any set at the institutional level when you are logged in.
- My Medical Preferences are found under Start > My Preferences > Medical Preferences

What preferences should I set?

- Clinical Notes
    - Subjective/Objective/Assessment/Plan (SOAP) Entry – This is a four-part detailed Clinical Note that should be reserved for medically trained staff or entry under their guidance. This should remain unchecked.
    - Notes/Examinations/Report Entry – This is a single text entry screen for the Clinical Note. This should be checked.
    - Open animal care staff medical summary box as default – Text entered into this box will also be displayed in the Husbandry module as a way to communicate medical Notes with the Husbandry staff. To save an extra click to open the box when entering a Note, this should be checked.
- Tests and Results
    - This allows you to set the default Laboratory for Test and Result entry screens. This can be edited at the time of data entry.

- External Laboratory – Check this if you usually use an outside Laboratory to run your Tests. Many commonly used Laboratories have been entered into ZIMS. This is a type-ahead lookup field so possible matches will appear when you start typing. If your Laboratory is not on the list, you can add one (see Adding Laboratories below).
- My Institution – Check this if most of your Tests are run in-house.

- Species360 Template Visibility
  - Display Species360 maintained Test Panels – To save you data entry time, this should be checked.

What are Institution Medical Preferences?

- Institution Medical Preferences will be set by the Medical Admin.
- All of the topics that can be set as My Medical Preferences can be set at the Institution level also, and these will be the default for any new medical Users. Your My Preferences should override these.
- Pathology – This is an additional topic available as an Institution Preference but not as a My Preference.
  - Staff for Pathology Submission Alert – Starting a Necropsy record will generate a ZIMS calendar alert for the staff member or Team specified in this Preference. The calendar alert lets the staff know that a necropsy submission has been made and provides some details on the deceased.
  - Enable Auto-incrementing Pathology Case Number – Not all institutions use Pathology Case Numbers. If yours does, you may want to consider checking this so you don't have to keep track.
  - Default Gross/Examination Location – Choose between an External Laboratory or your Institution.
  - Default Histopathology Location – Choose between an External Laboratory or your Institution.

Click here for more [help with My Preferences](#)
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Adding New Laboratories

How do I add a Laboratory?

- ZIMS already has an extensive list of global Laboratories, so before adding a Local Laboratory make sure you have done a thorough search or contacted support to help.

- Your Local Admin has the access to add local institutions. They will need the following information:
  - Institution Name
  - Institution Category (Other)
  - Country
  - Institution Type (Laboratory)
  - State/Province and City are optional but recommended
- This Laboratory will be available only for your institution to select unless Species360 finds that many facilities are adding it. They will then add it to the Global Institution List and everyone can use it.

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Opening Medical Module

How do I open the Medical module?

- There are two ways to open Medical records:
  - Start > Medical > Medical Records will open the Medical dashboard for all animals. If you drag this to the desktop before opening you will have very easy access to the Medical Records.
  - From within the Husbandry record > Medical Records tab will open the medical records for that animal. This tab is only visible to ZIMS users with a Medical Role.

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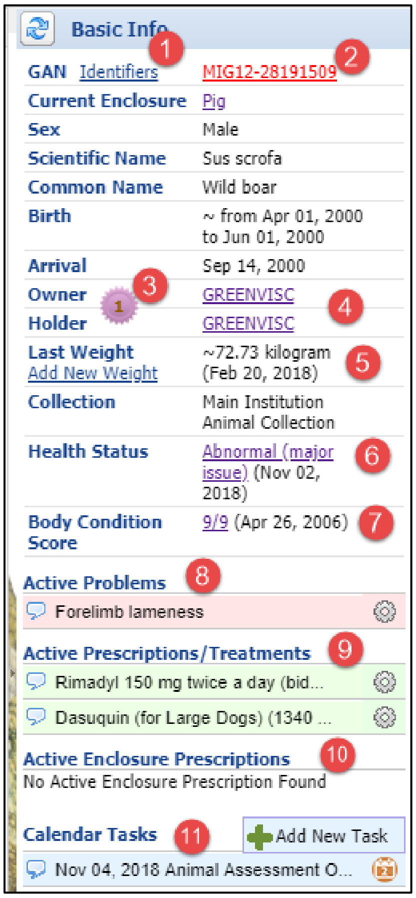
Navigating the Medical Dashboard

The Medical Dashboard defaults to the last 7 days of medical records entered by your entire team. If you are new to ZIMS Medical or have not entered data for over a week, the center panel will be blank until you adjust the date range.

How do I know what animal record I am in?

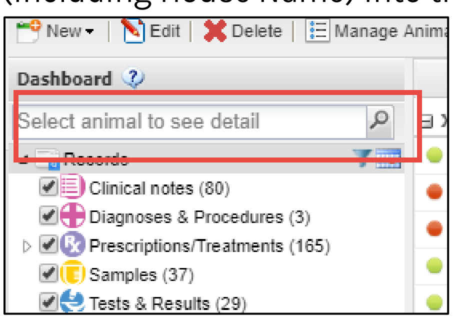
- The right-hand side of the dashboard displays Basic information on the animal that is in context (what record you are viewing). The upper information is sourced from the Husbandry record. The lower information is sourced from the Medical record.



1.The Identifiers hyperlink will quickly display any active identifiers to confirm you are in the right record.
2.Easily access the Husbandry record by selecting the GAN hyperlink.
3.The medallion will show you previous holders and the number of medical records and whether they are shared or not.
4.The current holding and owning institution are displayed.
5.You can add a new weight here. This will open the Husbandry record to enter a weight.
6.You can update Health Status.
7.You can update Body Condition Score.
8.Current Active Problems will display. You can Edit, Associate, Resolve or Delete.
9.Current Active Prescriptions and Treatments will display. You can Edit, Terminate, Clone or Delete.
10.Current Active Enclosure Prescriptions will display.
11. You can view, edit or add Calendar Tasks.

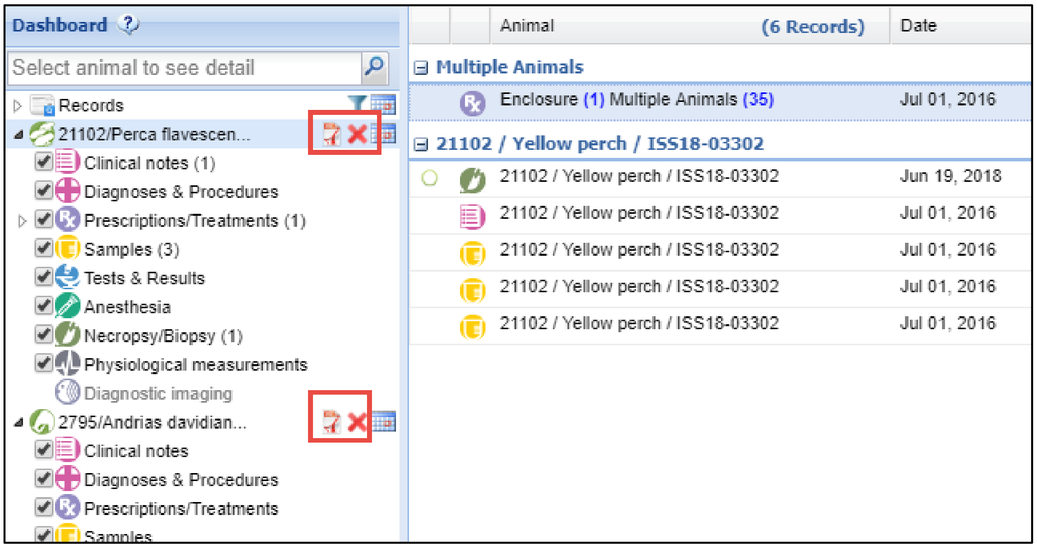
How do I find a specific animal's Medical record?

- If you would like to review a different animal's record in more detail, in the upper left-hand corner of the dashboard, you can type the GAN or other identifier (including House Name) into the "Select animal to see detail" field.



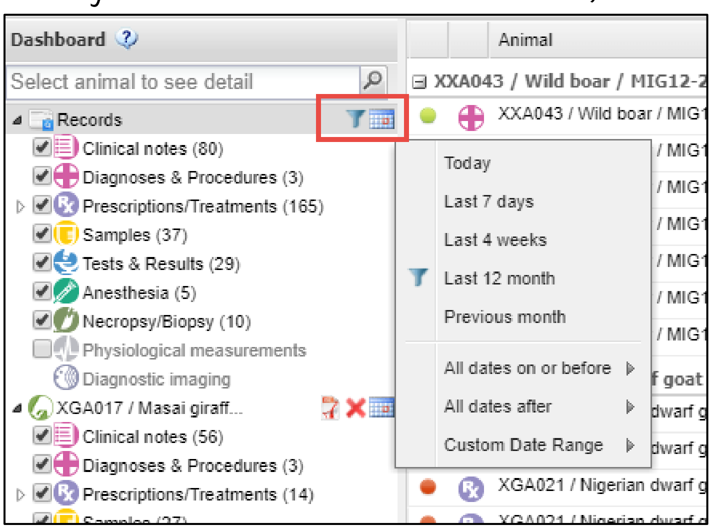
- Using this field, you can also use the magnifying glass to open a screen where you can search using multiple filters.

- You can also highlight a record from the center pane and drag and drop that record over to the left upper panel. It will display all the medical records related to that individual when highlighted. You can export the record to pdf or remove it permanently from the records list using the red "x".



How do I change the date filter?

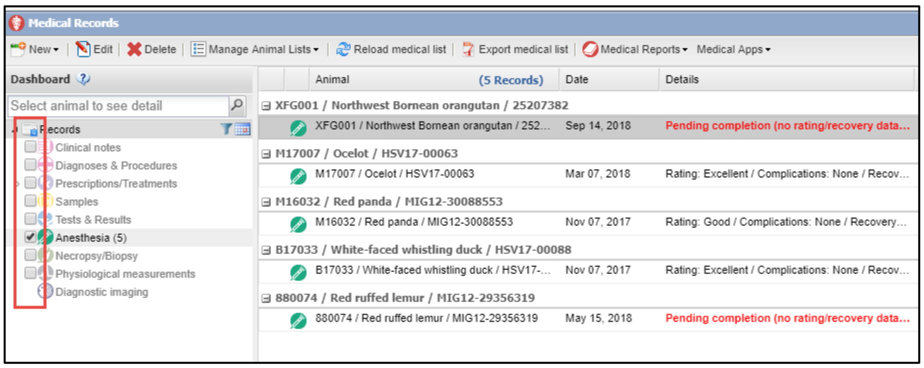
- The default date range is the last 7 days. To change it, use the calendar icon and make your selection. To remove the filter, select the funnel icon.



How do I filter the Dashboard display to show only specific record types?

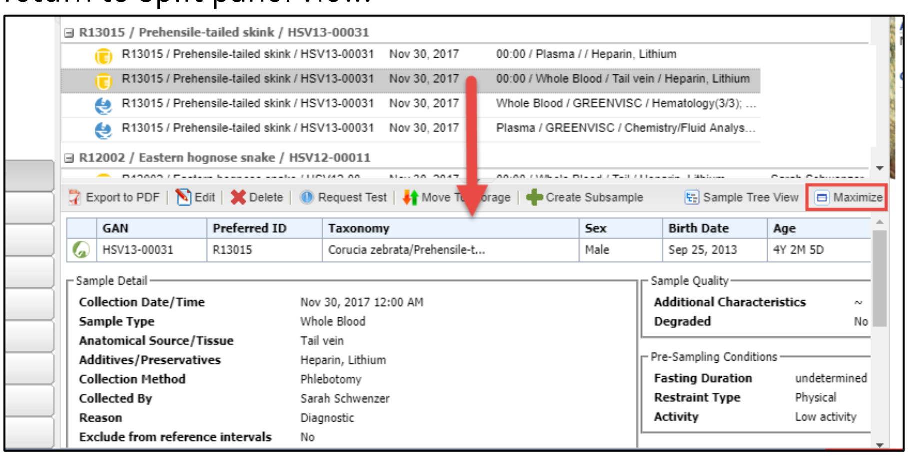
- Most often filtering by clicking on the Record Types in the left side menu to be the quickest way to toggle between reviewing different parts of a patient's record.
- By checking and unchecking the Record Types, you can filter what is displayed in the Dashboard.

  Here we have unchecked all but Anesthesia so you will only see immobilization records in the center panel. If you log out and log back in, ZIMS will retain this filter selection. To view more records, simply check the box again and the records will display in the center panel.



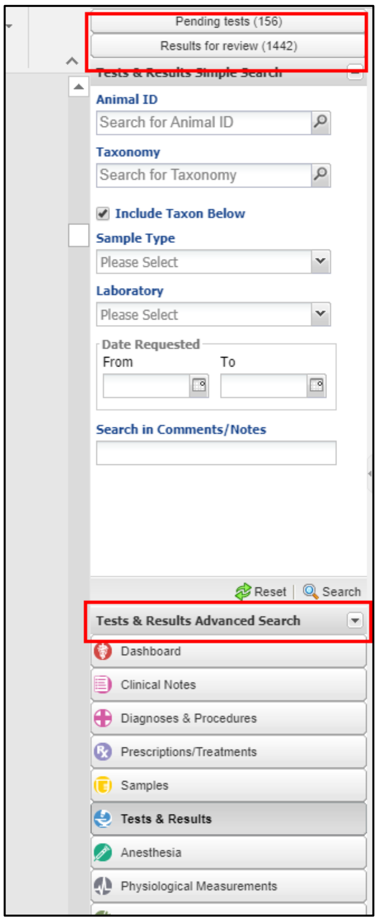
How do I see details for a specific record in the Dashboard?

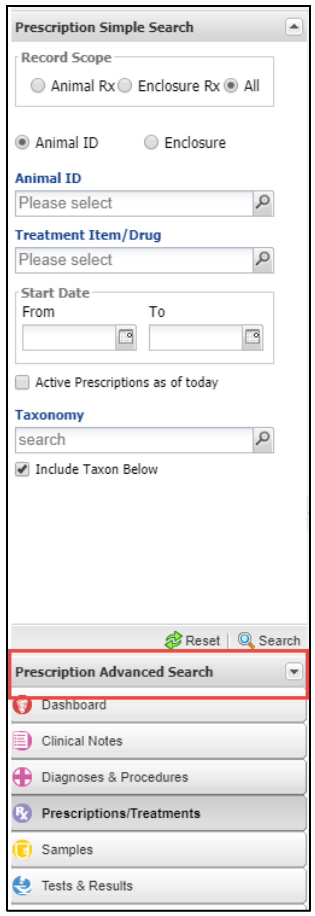
- When you highlight a record in the Dashboard, the details of that record display in the lower preview pane (bottom half of the center area). You can use the scroll bar to view the entire details or select the Maximize button. Click the Minimize button to return to split panel view.



How do I search for specific record types?

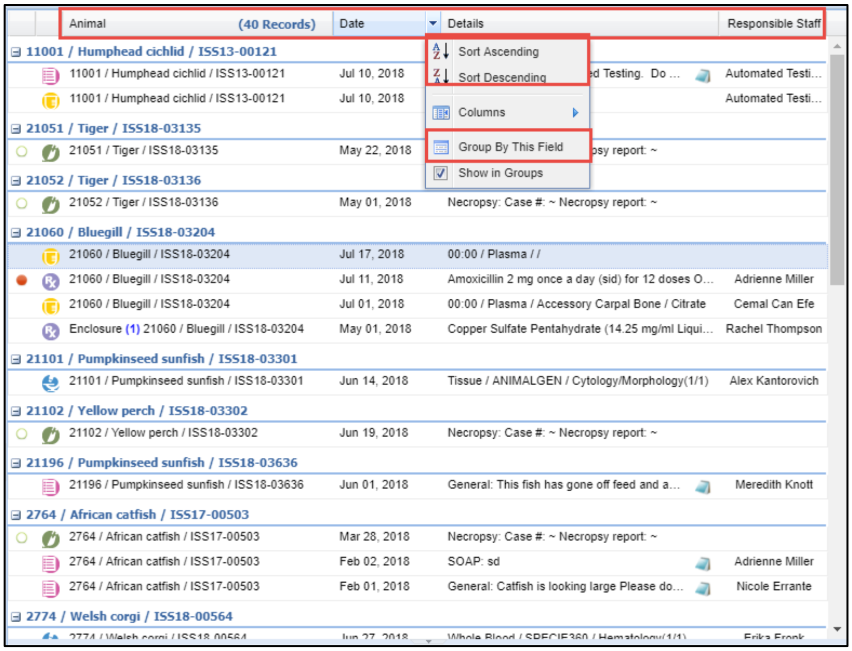
- Below the list of Records are the Searches by specific record types. The filters available will change depending on what record type is selected. Below we see the filters available for Tests & Results and Prescriptions/Treatments. Most have Advanced Search available with additional filters. Some, such as Tests & Results, have pre-defined Searches available.





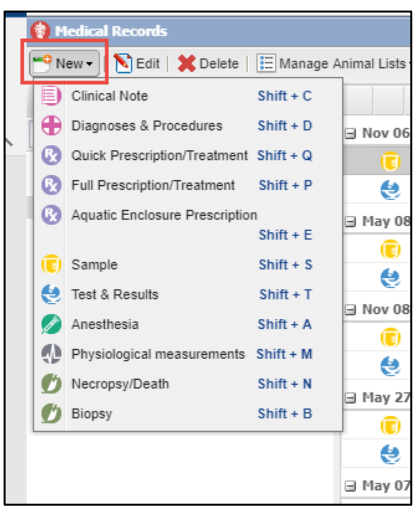
How can I customize my Dashboard?

- You can customize the Dashboard by selecting the down arrow to the right of the column header.
    - Columns can be sorted by ascending or descending order
    - You can add or delete which columns are displayed
    - You can select which column the display is grouped by
    - Unchecking Show in Group will display a list with no grouping



How do I add a record?

- We recommend searching for the animal and loading this record into the dashboard before starting a new record entry.
- To add a record, select the New button (upper left hand corner of the dashboard) and then select the record type you want to enter.



If you are adding a record from within a specific animal record or if you have an animal record in the left-hand records list and have highlighted it before selecting New, the Animal ID will prefill. If no animal record is selected, the Animal ID will need to be entered.

Click here for [**help with the Medical Dashboard**]

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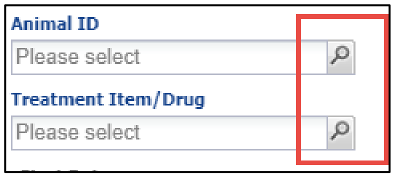
Type Ahead Lookup Fields

What is a Type Ahead look up field?

- Any fields with the Magnifying glass are Type Ahead Lookup Fields.



- These fields allow you to quickly find what you are looking for without having to type the entire name or number, saving you data entry time. But make sure that what pops up is actually what you were looking for!

How do I use a Type Ahead Lookup Field?

- Using multiple word fragments will narrow the search faster than continuing to type a whole word. For example, you are looking for a Treatment Item / Drug (ex: Enrofloxacin injectable 100mg/ml antibiotic) you can use the type-ahead to type:
  - "enro" - shows first 10 matches (many more that do not show)
  - "enro inj" - better; still shows 10 matches, but now all are injectable form
  - "enro inj 100" - best; down to 5 options
- The order of words does not matter. For example, "100 inj enro" gets you to the same list of 5 items.
- An example for taxonomy type ahead is "tham si" will find garter snake by its scientific name.
- An example for institution is "U Minn Uro" will find the University of Minnesota Urolith Center.

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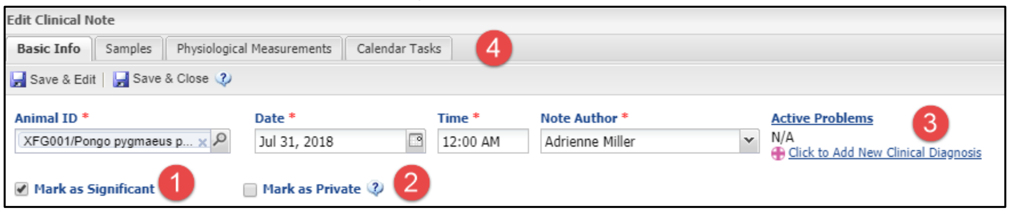
Clinical Notes

How and when do I write a Clinical Note?

- Clinical Notes are often the first type of medical data entry used in ZIMS. They allow for recording free text information and are a good starting place for your ZIMS adventure.

- Clinical Notes are used when the information isn't captured elsewhere in the module or to further explain information that is. As on all data entry screens, any fields that are mandatory are marked with a red asterisk *.
- It's important to note that in many regions, Clinical Notes are a legal document and should be written with that in mind. Be specific and concise with your note text and compose it as if it may be read or printed in a public forum or presented in court.



- 1-If you check the Mark as Significant checkbox a red exclamation point will display to the left of the Note in the medical record. This feature is meant to be used sparingly; if every note is marked significant, it no longer helps when trying to review most of the important parts of the medical history.
- 2-If you check the Mark as Private checkbox the note will not be shared outside your institution even if the medical history of the animal is shared with another institution.
- 3-Active Problems will display and you can add an associated New Clinical Diagnosis right from this Note screen if provided by the clinician.
- 4-Once you Save the Note, the remaining tabs at the top become active. You can add and manage Samples, record Physiological Measurements and create Calendar Tasks without leaving this screen

Should I record a SOAP Entry or a Notes/Examinations/Report Entry?

- A Clinical Note written as a SOAP (Subjective, Objective, Assessment and Plan) entry should only be used by a trained medical person or under their guidance. For a SOAP Entry, you do not need to select a Note Type.
- As a non-medical User, you should select to record the note as a Notes/Examinations/Report Entry. This is a single free text box to record your Note. For this type of entry, a Note Type is required.

When should I enter data in the Animal Care Staff Medical Summary?

- The Animal Care Staff Medical Summary is an optional entry found in Clinical Notes. You can choose to use this as a way to communicate medical information directly to husbandry staff via ZIMS as Notes written here will display under the Notes and

Observations tab in the animal husbandry record. They cannot be edited or deleted from the Husbandry module, they are view-only mode and have to be edited or deleted from the Medical Clinical Note.

If I enter a medical note in the Husbandry module does it impact the Medical module?

- Husbandry notes classified as Note Type = Animal Care can also have a medical sub-type. Medical notes added in the Husbandry module are not displayed in the Medical module and do not impact any global resources. Recording medical notes in the Husbandry module is always a safe way to add information without affecting global data.

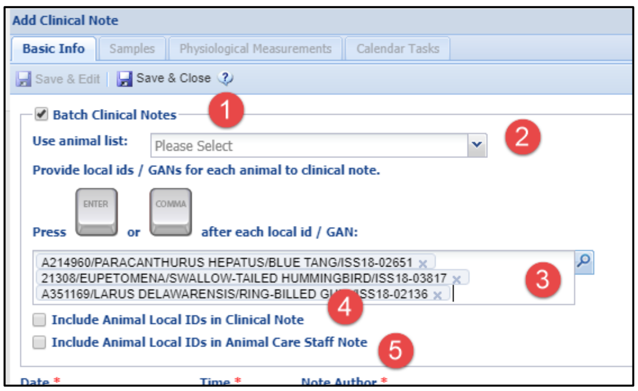
When should I create/use a Note Template?

- Note Templates are pre-written sections of text that can be inserted into most Note fields. They are faster than copy & paste because they are stored in one location, so they are easier to find (no need to find previous text entries for the copy & paste). They also help guard against missing important data that you want to record on a topic. When working in Clinical Notes, you only see Clinical Note templates so be sure to select a Template Type of "Clinical Note Template" when creating them. Having your Veterinarian and/or veterinary tech/nurse create or review the template text is strongly encouraged to set your team up for successful and accurate data entry moving forward.
- Some examples where Templates are useful:
  - Forms such as a rehab admission form
  - Culture and sensitivity results
  - Routine clinical procedures (nail trim, beak trim, recheck sample collection)
  - Quarantine exams
  - Neonatal exams
  - Necropsy protocols
- There are two ways to create and manage your Note Templates
  - From Start > Tools > Manage Note Templates
  - From within the Note itself by selecting the Save icon to Save the Template or the wheel icon to Add New, Edit or Delete a Template.

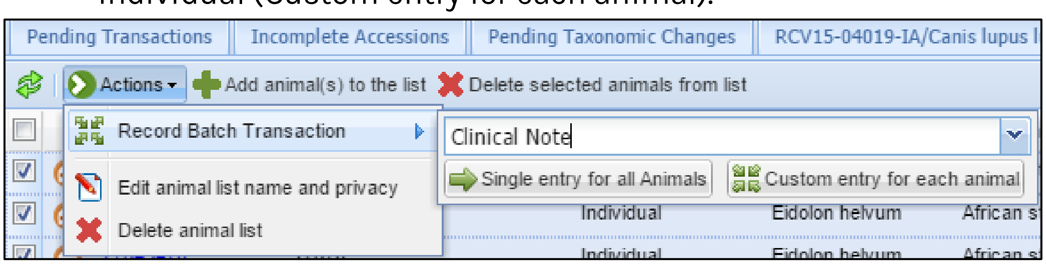
Click here for [help with Note Templates](#)

When should I record Batch Clinical Notes?

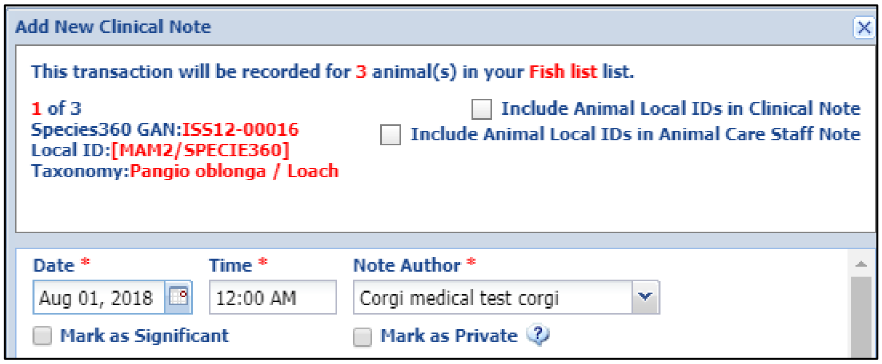
- Batch Notes allow for quick data entry for roundup events where you handle many animals in a single day and apply the same exam and procedures to each individual. You can use current Animal Lists or create your own for often-used groupings of animals. You can also create a list on the fly that you will not save by searching by taxonomy or the enclosure and selecting some or all results.
- To record a Batch Clinical Note from within the Clinical Note screen, click the Batch checkbox at the top left corner (1).



- You can use an Animal List (2) or enter the animal records you want the Note to be entered in by providing Local IDs or GANs (3). If you want the animal Local IDs included in the Clinical Note check this box (4) and if you want the Local IDs included in the Animal Care Staff Note check this box (5). It is highly recommended that you place the note text before the list of Local IDs so it will display in the record first. This method of recording a Batch Note will put the same Note in all records.
- If you need the option to customize each Note, enter a Batch Clinical Note from a search results grid or starting with an Animal List. Select the animals that you want included > Actions > Record Batch Transaction > Clinical Note. You can enter the same note for all animals (Single entry for all animals) or a custom note for each individual (Custom entry for each animal).



- If recording a custom note the record you are in will be identified at the top.



- You can also record a Batch Note from Add New Clinical Note in the medical dashboard. This navigation approach will not allow a custom entry and all Notes will be the same.

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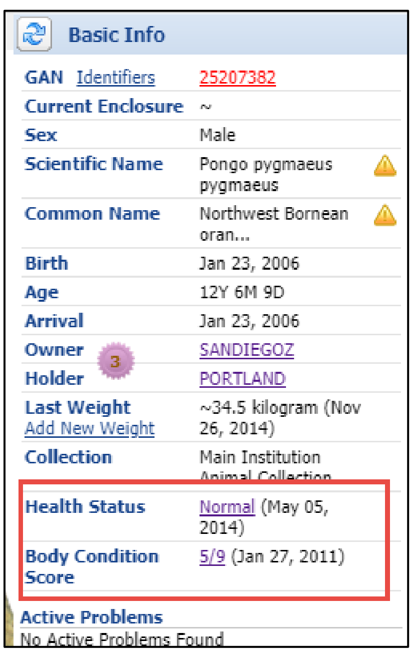
Health Status and Body Condition Score

How do I update Health Status and/or Body Condition Score?

- Both Health Status and Body Condition Score are displayed in the right-side Basic Info in the animal record. To update select the hyperlink.



- If you have access to the Husbandry module both Health Status and Body Condition Score can be updated from the Basic Info screen.

Why is it important to keep Health Status up-to-date?

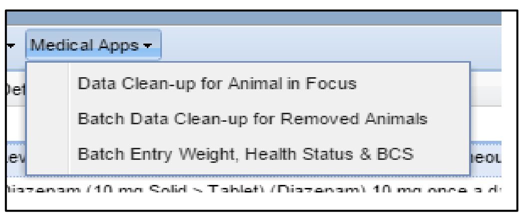
- The Health Status is very important to keep up-to-date because the data recorded on animals is only included in the Local and Global Reference Intervals if the Health Status is Normal. If there is no Health Status defined, or it is anything other than Normal, the data will not be included.

How do I enter Body Condition Score (BCS) if my institution uses a 5-point rating?

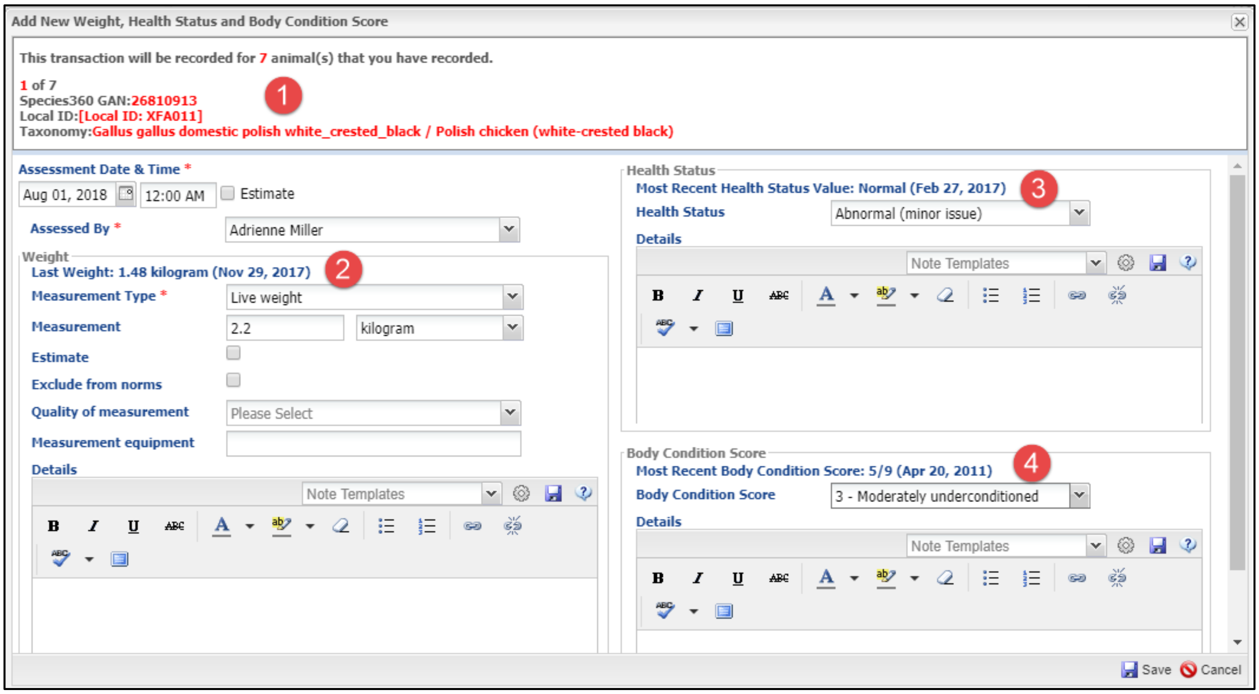
- If your institution prefers a 1 – 5 rating, simply use the odd numbers between 1 and 9 and the BCS scales become equivalent.

How can I update multiple Health Status and Body Condition Scores?

- To enter Batch entries for Weights, Health Status, and Body Condition Scores, from the menu bar in the Medical dashboard select Medical Apps > Batch Entry Weight, Health Status & BCS.



- You can use an Animal List or select one or more animals.



- The animal in focus will be displayed at the top (1). The last weight (2), Health Status (3), and Body Condition Score (3) will be shown for easy comparison.

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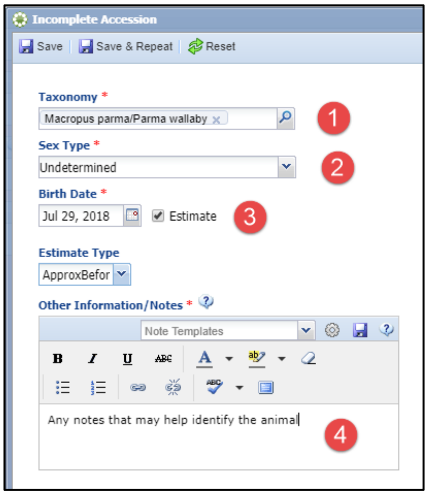
Incomplete Accession

What is an Incomplete Accession?

- Incomplete Accessions allow the creation of a record before the full accession of the animal. The Staff member charged with creating accessions may be on leave, but medical information needs to be captured on a new arrival or birth/hatch. Some examples are a neonatal exam done on a weekend, or medical care to stabilize a patient upon arrival from transport. All information recorded on an Incomplete Accession will be migrated into the permanent accession record when it is created later. Access to creating Incomplete Accessions needs to be assigned by the Husbandry Local Admin, it is not a Medical Role.

How do I create an Incomplete Accession?

- To create an Incomplete Accession, go to Start > Accession > Incomplete Accession.

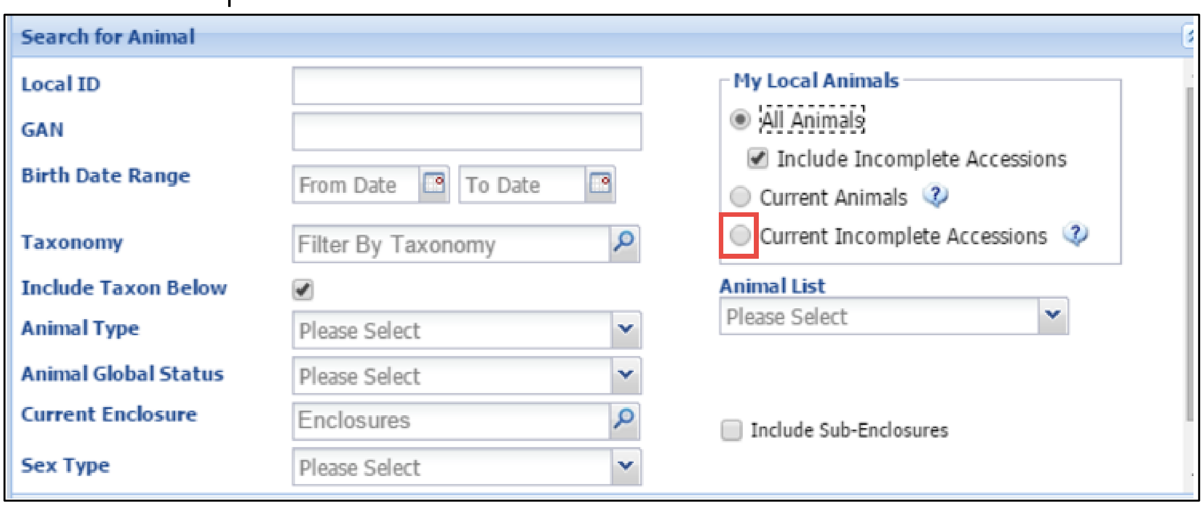


There is minimal information required.
1-The taxonomy must be correct, at least to the Genus level, as this is how ZIMS will look for possible Incomplete Accession matches when the full accession is created.
2-The sex type can be corrected at the time of creating the full accession.
3-The birth date can also be corrected later.
4-Notes are a required field that should provide the Registrar information about the animal that will help the Registrar with matching the full accession.

- An Incomplete Accession receives a temporary GAN that ends in "IA" which will become an "Old Accession Number" identifier once the full accession is created.

How do I find an Incomplete Accession?

- To find an Incomplete Accession you can enter the GAN into the search bar. Or, use the magnifying glass lookup in the search bar and check the radio button for "Current Incomplete Accessions".



How to I make an Incomplete Accession a true/full accession?

- You do not unless you have the Role access to do so. Usually, the Registrar/Record Keeper will complete the Incomplete Accession.

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Calendar

How do I get to the Calendar?

- There are five ways to access the Calendar:
  - My Calendar as a desktop icon
  - Start > Institution > My Calendar
  - My Calendar button in the upper right corner when the Medical Records module is open
  - Medical Basic Info > Calendar > Add New Task when you have a record in focus
  - Calendar tabs in Clinical Notes, Full Prescriptions and Sample

How do I create a Calendar task?

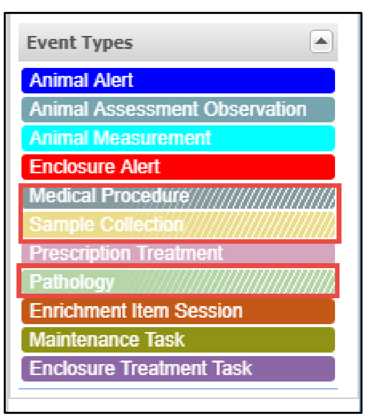
- To create a Calendar task left click on the desired date and complete the screen. Save & Repeat gives you the option to record a new task for the same animal or use the same date to record a task for another animal.
- To view the task simply click on it in the Calendar.

Can I assign a task to more than one Staff member?

- To assign a task to more than one person they must be members of a Team or Department. When assigned to a Team or Department, every member will see the task in their list of calendar tasks/items.

How can I filter what I see on the Calendar?

- The tasks can be filtered by clicking on them under the Event Types.
- Event Types that are not being displayed, or are disabled, are "greyed" out.



- The Calendar can be viewed by Day, Week, 2 Weeks, and Month.

How can I show my Supervisor that I have completed a task?

- Once completed you have the option to mark the tasks as done. Open the task and check Mark Complete.
- Checking the Hide Complete Tasks in the Calendar Item Search will remove all completed tasks from view.

What Calendar tasks are automatically generated?

- There are three Calendar tasks related to Medical records that are automatically generated:
    - Animal Assessment Observation at the end of a prescription
    - A necropsy pending reminder is generated when a carcass is submitted
    - If the treatment Start Date is in the future, the system will generate a start treatment reminder.

How can I see a list of all of my tasks without scrolling through the Calendar?

- Select List View in the upper right-hand corner.
- The columns can be sorted and customized.
- The List can be exported and printed.

Is creating Calendar Tasks available as a Batch Action?

- Calendar Tasks are not available in the Batch Action menu. Use the Save & Repeat option to speed up your data entry for multiple Tasks.

How can I use the Calendar to help the Consulting Veterinarian on their visits?

- You can create Animal Assessment/Observation task types that can be used to schedule and track tasks for the visiting Veterinarian.
    - Click on the date of the Vet visit
    - Select Animal Assessment Observation (or Medical Procedure if appropriate)
    - The date would be the date of the visit
    - Assign it to yourself
    - Put a summary of the problem in the title field and details in the Notes field.
- Create a list for the Vet
    - Run a report
        - Under List View select the date and run the report, or

- Under Medical Reports select Calendar Items Report and select the date
- You can also use the Calendar to capture "end of treatment" reminders for the Vet to review.

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Dictionaries

How do I find the Dictionaries?

- The Dictionaries are found under Start > Medical > Dictionary.
- Term Dictionary - ZIMS contains a large list of Medical Terms. An easy way to find what you are looking for is to use the Search Terms and filter by Term Type. Hovering over the Term Type will define that Type.
- Treatment Dictionary – This allows you to search for drugs by Name, Active Ingredients, and Item Type. There is also a Dictionary Advanced Search to further filter your search to easily find the drug you are looking for.
- Test Dictionary - If you don't know the full test name you can search by Category, Valid Sample types, and Primary Result Type. Tests are only added by Species360 to maintain global consistency and allow for improved reference intervals in the future. Users can request a new test using the fillable Word document Global Test Request found in the ZIMS Help Menu. Once we have all the needed information on this form it usually takes just a few days to add a new test.
    - If you are having trouble finding a Test, ask support@Species360.org for help to avoid guessing.

Can I add a new Term or Treatment?

- Although these Dictionaries do have Add New options, we recommend that additions are made only by medically trained Staff or under their supervision. If you need help finding a Term or Treatment contact support@Species360 for assistance rather than trying to add a new Local one.

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Samples

How do I record collecting a fecal Sample on a single animal?

- Select New > Sample from the upper left-hand of the Dashboard.

- If you are already in an animal record or have it highlighted in the dashboard, the Animal ID will be prefilled. If not, you will need to enter the Animal ID. Starting from within the animal record can reduce confusion.
- Record the data for the required fields of Collection Date, Sample Type (this drives what displays for many of the other fields), and Status.
- Some other fields you may want to complete include:
  - Collection Method (this is driven by what you selected as the Sample Type).
  - Exclude from Reference Intervals – Only Tests done on a Sample of animals whose Health Status is Normal will be included in the Global Resources, but there may be other reasons that you may not want Tests taken on this sample to be included.
- Most of the other fields should be completed only under the supervision of a medically trained person.
- Once the Sample Details are saved, a Calendar Task tab becomes active to help you schedule further Sample collections if desired.

How do I record collecting a fecal sample from a herd?

- Record the Sample just as you would for a single animal except check the Multiple Animal IDs checkbox.
- You can use an Animal List(s) or select animals one at a time. You can also use the magnifying glass icon to open an animal search and search by enclosure or taxonomy to generate a list of animals represented by this composite sample.

How can I save data entry time for recording commonly collected Samples such as monthly fecals?

- Create a Favorite Sample.
- Complete the Sample screen as desired and select the Save icon in the upper right-hand corner.
- Name it so you can easily find it again.
- It will be available in the Favorite Samples drop-down list to select from.

Click here for more help with Samples

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Tests & Results

Tests & Results are a module in ZIMS Medical where you have to be extremely careful when entering data. It can be a challenge even for those who are medically trained. Test names and methods can be very specific and can make a big difference to the global medical resources database. Work with a trained Veterinarian to determine exactly what tests you will be requesting. Or, if an External Laboratory is doing the test you can contact them for the correct name and methodology. Do not guess!! If you just pick a test at random and enter the results, you degrade any future reference intervals for that test - methodology does make a difference to the reference intervals, but that information gets lost when all the methodologies are mixed.
If your laboratory is not helpful and you do not have medically trained staff to consult, please contact Species360 staff (support@Species360.org) and we will attempt to provide help with setting up a panel for your routine tests. Remember, incorrect test result records don't just impact your institution, they can have a negative impact on the reference intervals for the entire global community.

How do I request a Test on a Sample?

- There are three approaches for requesting Tests on a Sample:
  - From the Dashboard, highlight the Sample and select Request Test at the top of the bottom preview pane. This will open a list of the Samples and any Subsamples created from it.
  - New > Tests & Results from the upper left of the Dashboard.
    - If you have an animal in context any Samples and Subsamples on the animal will display.
    - If you do not have an animal in focus you will need to select it.
  - If you have not yet recorded the Sample, from the Test Request screen you can use Add New Sample to create one and request a Test.
- Highlight the desired Sample and Select & Continue.
  - If you select an External Laboratory the name must be provided. See Adding Institutions if the Laboratory is not found in the drop-down list.
  - The Sample Info will display but is not editable.
  - If you are requesting one or two tests you can use the Add New Test option. If you know the name of the test you can start typing it until it is recognized. Or, you can use the look-up to search by Test Category, Test Abbreviation, or Result Type.

- If you are uncertain contact support@Species360.org.

I often request the same set of Tests over and over. How can I save data entry time?

- Use Test Panels instead of entering Tests one by one. ZIMS Medical has many Global Test Panels already created to select from.
- Panels are for a specified laboratory and will be filtered by what Laboratory you entered in the Test Request Details field. The Panels are also restricted by the Sample Type; therefore, both laboratory and sample types must be valid for the test panel you've chosen.
- The Tests are in the same order on the data entry screen as on the printed laboratory report which speeds up data entry.
- To use a Test Panel, select from the Test Panel drop down. Remember what is displayed is filtered by Laboratory and Sample Type.
- Use the wheel icon to the right to view all available Test Panels

Can I create my own Local Test Panels?

- You can create your own Local Test Panels if you do not find a global one that meets your needs. Often these are created for Tests done in your institution's laboratory such as for manual complete blood cell counts, parasitology, and urinalysis.
- Because of the potential impact on global resources, create a Local Panel only under the supervision of a medically trained person.

How do I record the Test Results?

- To record the Test Results, open the Test & Result screen where you recorded the Tests requested and record the results. You should only proceed if you have collaborated with your veterinarian or nurse. Be very careful with your data entry as the global resources may be impacted.
- The Expected Results column displays the Global Reference Intervals if there is a value available in the database for the taxonomy in context.

For additional help:

- **Expected Test Results**
- **Recording Tests and Results**

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Diagnoses & Procedures

How do I enter a Diagnosis or a Procedure – if the diagnosis or procedure details are provided by the veterinarian:

- To enter new diagnoses or procedures New > Diagnoses & Procedure.
- If you have an animal in focus on the left-hand dashboard the Animal ID will prefill, otherwise you need to enter it. You can also get to this screen using the hyperlink at the top of the Clinical Notes screen.
- The Diagnosis or Procedure will be entered in the Medical Concern field.

Why can't I enter lameness and coughing on the same screen?

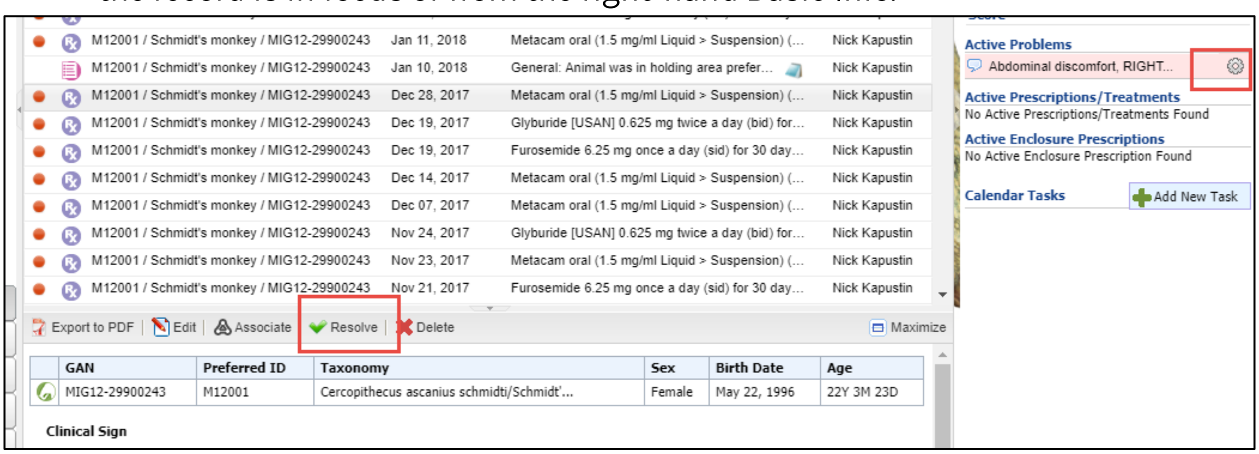
- A Diagnosis & Procedure must have one, but only one medical concern. If you are recording lameness AND the surgery to fix it, you will need to do two entries. A medical concern is built out of a series of terms that describe and define the medical issue. To understand what terms can be entered, read the "?" and hover over to the right of the Medical Concern or Procedure field.

Can I add a new Term?

- You can, but only create new Terms under the supervision of a medically trained person.

How do I resolve a Medical Concern?

- They can be resolved and/or edited from the top of the lower center dashboard when the record is in focus or from the right-hand Basic Info.



- They can also be resolved using the Data Clean-up tool under Medical Apps at the top of the dashboard or Cleanup Medical Records from the Case Info tab under Necropsy.
- Remember to update the Health Status when you resolve a medical condition or problem to keep your data quality in sync. If you don't do this, ZIMS will give you a pop-up reminder the next time you view records for this patient.

Click here for help with Diagnosis and Procedures
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Physiological Measurements

What is a Physiological Measurement?

- Physiological Measurements are often taken during examinations and anesthesia. Common measurements are body temperature, heart rate and respiratory rate. They help determine any possible risks to the well-being of the animal.

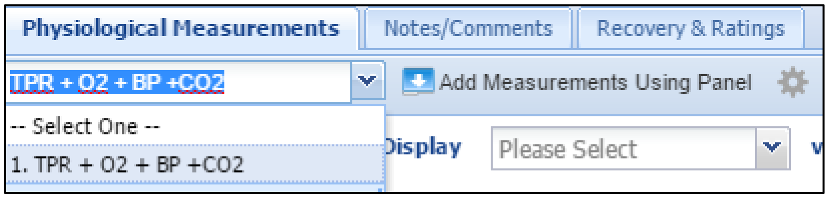
How do I record a Physiological Measurement?

- Go to New > Physiological Measurements.
- Physiological Measurements can also be recorded from within the Anesthesia module.
- If you have a single measurement to record, select Add Single Measurement and complete the screen.

How can I save data entry time and enter multiple measurements?

- You can create a Physiological Measurements Panel. Unlike Test Panels, there are no default Physiological Measurement Panels created by Species360. They are all Local panels.
- Create a panel by clicking the wheel icon to the right of Add Measurements Using Panel. From there, you can create a new panel, edit an existing one, or delete panels.
- When creating a new panel, be sure to include the default unit of measure, default equipment used, and anatomical site so that you have very little editing to do when using your panel. To enter that information just click on the white space below the column heading in each row to the right of the measurement. Use the far right arrows to arrange the order of the measurements as you desire.

- To use the panel, select it from the drop-down list and click on the “Add Measurements Using Panel” button.



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Prescriptions

Please remember that prescriptions must be approved by a licensed veterinarian and written precisely to ensure all legal requirements are included. We recommend you follow a written template from your veterinarian. If you don’t have one, this information should be entered into notes to avoid incorrect data that impacts the global drug usage reference calculations.

What is the difference between a Quick Prescription/Treatment and a Full Prescription/ Treatment?

- A Quick Prescription is used for *one-time treatments* such as vaccinations, a single dose of anthelmintic, or fluids administered during anesthesia. Think “one and done”.
- Batch Prescriptions (check the box in the upper left corner and enter Animals by GAN or Local ID or select an Animal List) can be recorded when you give the exact same dose to several animals. An example of a Batch entry would be vaccinating the flock of flamingos for West Nile Virus. 14 birds got the same volume of vaccine from the same lot number.
- When recording any drugs, treatments, or therapies try to do so in a standardized way so you can later search for them and review usage.
- A Full Prescription is typically *administered over a time period* such as antibiotics; it will also have a frequency (e.g. twice a day). Multiple Animal IDs (check box in the upper left and select animals or an Animal List) are intended for the situation where you apply a single volume of a drug to an entire group and all animals share the dose; you cannot confirm how much each animal specifically ingested. An example of Multiple animal records would be top-dressing feed with Ivermectin and offered

to a herd of antelope. You can access the Global Drug Usage Extracts from this Full Prescription screen.

- When recording any drugs, treatments or therapies try to do so in a standardized way so you can later search for them and review usage.
- Once you Save the Basic Info for a Full Prescription, five additional tabs become active – Dispensing, Administration, Staff Instructions, Calendar Task, and Treatment Response.
- Record Full Prescriptions only under the supervision of a medically trained person.

What is an Aquatic Enclosure Prescription?

- Aquatic Enclosure Prescriptions are intended for continuous immersion prescriptions for aquatic enclosures. This allows you to record the prescription against an enclosure with many occupants and/or multiple taxa. The treatment concentration calculations are based on the system volume. The treatment duration can be extended beyond the number of doses delivered such as when a drug remains in the system until life support components or water changes are implemented.
- Record an Aquatic Prescription only under the supervision of a medically trained person. Remember, these records have legal implications and require a veterinarian's approval.
- Once you Save an Aquatic Treatment, four additional tabs become active – Dispensing, Administration, Calendar Task, and Treatment Response.
- Any Active Enclosure Prescriptions will display in the right-hand Basic Info when an animal occupying the enclosure is in focus.

How do I terminate a Full Prescription?

- To terminate a prescription for any reason (patient non-compliant, change drug based on response or culture results, etc.) you can select Terminate from the menu bar on the preview panel when the Treatment is selected in the main dashboard. You can also terminate from the right-hand Basic Info.

What is the difference between Save & Repeat and Clone options?

- Both options help you save time.
- Save & Repeat is available for both Quick and Full prescriptions when you are ready to Save. You have the option to use the same drug for a new animal (for example: (administering 1 week of aspergillosis prophylaxis to several penguins in

preparation for transport), or a new drug for the same animal (for example: recording multiple treatments for the same individual animal).

- Cloning makes a copy of an existing prescription record and opens that record in edit mode. To Clone, highlight the record in the dashboard and select Clone at the top of the preview panel. Repeated treatment calendar items have links back to the original record and a Clone button. Be sure to double-check that the patient's weight is not significantly different from the original prescription. If it is, the dose may need to be recalculated.

Click here for help with Prescriptions
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Anesthesia

Anesthesia records are used to build the Anesthesia Summaries Global resource. Unless you are confident that the anesthesia records you create are complete and accurate, it is best to avoid this section of medical records. Incorrect information in the global resource has the potential to adversely impact animals at other institutions that rely on the anesthesia resource for drug protocols.

What can I enter in the Anesthesia module?

- Many of the tabs in the Anesthesia module contain data that must be collected at the time of anesthesia (Drugs Given, Effects & Milestones, Physiological Measurements, and Recovery Ratings). If the anesthesia is performed by a medically trained person and they are willing to oversee complete and accurate data collection on a worksheet during the anesthesia event and review the ZIMS anesthesia record, then data entry can be attempted by non-medical staff.
- If you cannot create a complete and accurate anesthesia record, enter the information you do know into a Clinical Note using a keyword or phrase such as "Anesthesia event" so that the notes containing anesthesia information can be easily found.
- If you are creating an anesthesia record, you can complete the information in the Basic Info tab, leaving the other tabs for trained personnel.
    - If the Clinician responsible for the anesthesia is not a Staff member, ask your Local Admin to add them without giving access to ZIMS so they can be selected here.

- The Health Status is a hyperlink that will allow you to view/add/edit/remove the health status history of the patient. It displays the Health Status for the anesthesia event Start Date. If you are entering historical records the current value may be different.
- If a weight has previously been recorded, it will default to the last weight. If that weight is no longer accurate, even as an estimate, then either toggle the selection to record new actual weight or edit the existing entry to reflect the current body weight. Add a new weight will be selected by default if no weight is recorded historically. Take care to check/uncheck estimate/exclude from reference intervals as appropriate.
- There are three options for recording anesthesia location:
  - Enclosure - This has a link to your enclosure detail page.
  - External institution - This is populated from the institution list so please be sure to add local institutions if necessary.
  - Geolocation - Best for use in the field with available GPS data.
  - Undetermined - If you don't know where the event occurred or if the event started in one location and moved to another, Undetermined is your best bet.

Click here for more help with Anesthesia
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Necropsy/Biopsy

What can I enter in the Necropsy/Death module?

- The Necropsy/Death module is a complex record that includes Gross Necropsy, Samples & Tests, Histopathology, Images and Necropsy finalization. Most of this information should be entered by a medically trained person as it impacts the global medical resources.
- You can enter data into the initial Submissions tab. The Submission tab gathers general information about the death such as Death Date, Manner of Death, Location, and Notes. If a Death has been recorded in the Husbandry module, the Death Date and Manner of Death will be prefilled.
- If you have a written report from your veterinarian or pathologist, you may cut and paste the report into the Gross Necropsy Report and the Histopathology Report sections. The final diagnosis can be pasted into the note on the finalize tab and the record saved and locked.

What is an Incomplete Disposition?

- If a death has not yet been recorded in the Husbandry module, no data will be prefilled. Once this tab is Saved, an Incomplete Disposition will be created in the Husbandry module. This gives the Registrar a heads up that a death occurred, and they can record it in the Husbandry module.

Click here for more help with Pathology
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Reports

The Medical Reports can be found from Start > Medical > Medical Reports or at the top of the medical dashboard. Each report has its own specific filters. Once you start entering data you should spend some time running the various reports with different filters, so you gain experience in knowing which report to run to get the information that you are looking for out of ZIMS.

If there are specific reports with specific filters that you find you commonly use, you can select to create Favorite Search Filters by completing the filters you want and selecting the Save icon. You then name the filter and Save it. It will appear in the Saved Filters dropdown for selection. This can be a great time saver.

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