
ZIMS for Medical Training Index

To quickly search these topics use “Ctrl+F” (Apple+F) to find specific words or phrases.

If you have downloaded this PDF you may be missing new topics, check here for updates:

<https://training.species360.org/MedicalLibrary/>

If you have any questions, please contact support@Species360.org.

Index of Topics

[Getting Started](#)

-[Overview](#)

-[Dashboard Navigation](#)

-[Type Ahead Lookups](#)

-[Post-Deployment Skills](#)

[Dictionaries](#)

[Global Resources](#)

[Medical Administrator](#)

[Managing Staff and Roles](#)

[Adding Institutions and Contacts](#)

[External Sharing](#)

[Incomplete Accessions](#)

[Medical Preferences](#)

[Medical for Non-Vet](#)

[Time Savers and Tips](#)

[Clinical Notes](#)

[Body Condition Score and Health Status](#)

[Diagnosis and Procedures](#)

[Samples and Tests](#)

-[Samples and Sample Storages](#)

-[Tests and Results](#)

[Physiological Measurements](#)

[Prescriptions and Treatments](#)

-[Animal Prescriptions and Treatments](#)

-[Aquatic Enclosure Prescriptions and Treatments](#)

[Anesthesia](#)

[Necropsy and Biopsy](#)

[Husbandry Module Related](#)

[Medical Data Quality](#)

[Reports and Searches](#)

-[Reports](#)

-[Searches](#)

Getting Started

Overview

Description: General overview of the Medical module.

Features Available:

- **Feature:** ZIMS Medical navigation
- **Feature:** Medical records display in Husbandry module
- **Feature:** Incomplete Accessions and Dispositions

Related Materials:

- [Medical Overview](#): Powerpoint that shows basic ZIMS Medical Navigation and functionality
- [Search Panels](#): Video on using the Search Panels

Dashboard Navigation

Description: An overview of how to navigate the medical dashboard.

Features Available:

- **Feature:** List of records
- **Feature:** Main dashboard display of records
- **Feature:** Preview Pane
- **Feature:** Basic Info
- **Feature:** Record searches
- **Feature:** Adding a medical record
- **Feature:** Group View Plus

Related Materials:

- [Dashboard Navigation](#): Help document on dashboard navigation
- [Medical Dashboard Navigation](#): Video of medical dashboard navigation
- [Group View Plus](#): How to view medical records for other groups/individuals who may be associated with a group in focus

Type Ahead Lookups

Description: How to find what you are looking for as quickly as possible.

Features Available:

- **Feature:** Identifying Type Ahead fields
- **Feature:** Using Type Ahead fields

Related Materials:

- [Type Ahead Lookup Fields](#): Video on using Type Ahead Lookups

Getting Started

Description: How to get started using ZIMS Medical

Features Available:

- Feature:** Initial Set Up and Medical Admin Responsibilities
- Feature:** Navigating the Medical Dashboard
- Feature:** Husbandry and Medical Global Resources
- Feature:** Overview of the Medical modules

Related Materials:

- [Getting Started in ZIMS Medical](#): Guide to getting started with the module

Post-Deployment Skills

Description: Skills you should master in ZIMS Medical module

Features Available:

- Feature:** Checklist of 16 basic skills for using the Medical module

Related Materials:

- [Post-Deployment Skills](#): Checklist for using the module

[Back to Index of Topics](#)

Dictionaries

Description: How to use the medical Dictionaries in ZIMS.

Features Available:

- **Feature:** How to search the Dictionaries
- **Feature:** How to add new Terms to the Dictionaries

Related Materials:

- [Term, Treatment and Test Dictionaries](#): PowerPoint for Dictionary overview
- [Test Dictionary](#): Help document for the Test Dictionary
- [Term Dictionary](#): Help document for the Term Dictionary
- [Treatment Dictionary](#): Help document for the Treatment Dictionary
- [Inventories and Dictionaries](#): Video on Drug Inventories and Dictionaries

[Back to Index of Topics](#)

Global Resources

Description: Resources using the shared medical data entered by Species360 members.

Features Available:

- **Feature:** Anesthesia Summary - globally most commonly used anesthetic drugs and drug combinations - and locally calculated summaries based on your data.
- **Feature:** Drug Usage Extract - search by Drug Name, Drug Category and Taxonomy for commonly used drugs
- **Feature:** Test Results - Can search by Test or search by Expected Test Results
- **Feature:** Morbidity and Mortality - most common clinical issues, relevant death information and diagnosis (local search only)

Related Materials:

- [Global Medical Resources](#): Guided walkthrough on how to find the Global Medical Resources
- [Global Resources - Inclusion Guide](#): A detailed overview of the rules that apply to each data type included in the global resources to guide you during data entry and best practices.
- [Global Resources - Source of Resources](#): PowerPoint identifying where the husbandry and medical data for the Global Resources is sourced from
- [Global Medical Resources](#): PowerPoint about how to use the Global Medical Resources
- [ZIMS Global Resources](#): Video of a recorded Tips and Tricks about where the husbandry and medical data for the resources is sourced from
- [Expected Test Results](#): Video on using the Expected Test Results resource
- [Expected Test Results Vet](#): Detailed Help document on using the Expected Test Results from a Veterinarian's point of view
- [Expected Test Results Help](#): Help document on Expected Test Results

- [Global Drug Extracts](#): Help document on using the Global Drug Extracts
- [FAQs on Reference Intervals](#): Help document detailing Expected Test Results

[Back to Index of Topics](#)

Medical Administrator

Managing Staff and Roles

Description: How to Manage Your Medical Staff and Roles

Features Available:

- **Feature:** How to assign Species360 Template Roles
- **Feature:** How to create custom Roles

Related Materials:

- [Creating and Assigning Roles PPT](#): Powerpoint on how to assign Roles and create custom Roles
- [Creating and Assigning Roles Help](#): Help document on assigning Roles and creating custom Roles
- [Rights and Roles](#): Video on assigning Rights and Roles
- [Add Staff and Assign Roles](#) (requires ZIMS log-on)
- [Update Medical Roles](#) (requires ZIMS log-on)

Adding Institutions and Contacts

Description: Adding Local Institutions and Contacts

Features Available:

- **Feature:** How to add local institutions such as Laboratories
- **Feature:** How to add local Contacts such as Pathologists

Related Materials:

- [Add Institution](#) (requires ZIMS log-on)
- [Add External Pathologist/contact](#) (requires ZIMS log-on)

External Medical Sharing

Description: External Medical Sharing

Features Available:

- **Feature:** How to activate medical sharing
- **Feature:** The levels of medical sharing
- **Feature:** How to share animals or taxonomy
- **Feature:** How to find animal records shared with you
- **Feature:** Sharing sample with Biobank

Related Materials:

- [Medical Sharing](#): Help document on how to use external Medical Sharing



- [Sharing Samples](#) with Biobank: Help on using the regional consortium sample sharing feature.
- [Batch Sample Sharing](#) with Biobank: Quickly share multiple samples with regional biobank consortium.

Incomplete Accessions

Description: Creating Incomplete Accessions

Features Available:

- **Feature:** How to create an Incomplete Accession

Related Materials:

- [Incomplete Accessions](#) (requires ZIMS log-on)
- [Incomplete Accessions](#): PPT on Incomplete Accessions

Medical Preferences

Description: Medical Preferences

Features Available:

- **Feature:** How to set your Medical Preferences

Related Materials:

- [General ZIMS Preferences](#): Help document on all the preference options in ZIMS.
- [Medical Preferences](#): Video on setting your Medical Preferences

[Back to Index of Topics](#)

Medical for Non Vet

Description: Guidance on using the ZIMS Medical module for non-medically trained Staff

Features Available:

- **Feature:** What medical data entry can safely be done by non-medically trained staff
- **Feature:** What data entry should be reserved for medically trained staff

Related Materials:

- [Best Practices for Non-Veterinary Staff](#): Help document detailing what can and cannot be entered in the Medical module by non-medically trained staff
- [Medical without a Vet](#): PPT detailing what information can be entered into the Medical module when you do not have a Vet on staff

[Back to Index of Topics](#)

Time Savers and Tips

Description: Top 11 Hints to make your Medical data entry count

Features Available:

- **Feature:** Provides hints to save you time, avoid duplication of data entry and keep the global resources accurate

Related Materials:

- [11 Hints for Medical Data](#): Document defining what to do and what not to do to improve your Medical data entry

Description: How to save time by entering data into multiple records at the same time

Features Available:

- **Feature:** Highlights the areas in ZIMS Medical module where Batch Actions can be done

Related Materials:

- [Batch Actions](#): Help document for performing Batch Actions

Description: Allows viewing of medical records for individuals/groups associated with another group

Features Available:

- **Feature:** From a group medical record you can select to view all records for animals associated with the group via splits or merges

Related Materials:

- [Group View Plus](#): Help document for how to view these associated medical records

[Back to Index of Topics](#)

Clinical Notes

Description: What Clinical Notes are and how to record them

Features Available:

- **Feature:** Three different Types of Clinical Notes
- **Feature:** Creating Batch Clinical Notes
- **Feature:** Note Templates
- **Feature:** Clone Clinical Notes
- **Feature:** Searching for Clinical Notes
- **Feature:** Using Animal Lists to create Batch Clinical Notes

Related Materials:

- [Clinical Notes Help](#): Help document for Clinical Notes
- [Batch Entry Help](#): Create notes for more than one animal at a time
- [Animal Lists](#): Help document on creating and managing Animal Lists
- [Clinical Notes PPT](#): PowerPoint for Clinical Notes
- [Clinical Notes Video](#): Video on using Clinical Notes
- [Update Diagnosis and Health Status Video](#): Video on updating Diagnosis and Health Status from within a Clinical Note
- [Note Templates](#): Video on creating and using Note Templates

- [Managing the Calendar](#): Medical Alerts set from a Clinical Note

[Back to Index of Topics](#)

Body Condition Score and Health Status

Description: Using Body Condition Score

Features Available:

- **Feature:** Scoring system
- **Feature:** Using a 5-point scale

Related Materials:

- [Body Condition Score](#): Help document on using Body Condition Score

Description:

Features Available: Using Health Status

- **Feature:** Importance of defining Health Status
- **Feature:** Impact on Global Resources

Related Materials:

- [Health Status](#): Help document on defining Health Status
- [Update from Clinical Note](#): Video on how to update from a Clinical Note

[Back to Index of Topics](#)

Diagnosis and Procedures

Description: Using the Diagnosis and Procedures module

Features Available:

- **Feature:** Business Rules for data entry in the module
- **Feature:** Entering data in the module
- **Feature:** Linking and associating information between modules

Related Materials:

- [Diagnosis and Procedures Help](#): Help on entering Diagnosis & Procedures
- [Update Diagnosis from a Clinical Note](#): Video on how to update from a Clinical Note
- [Diagnosis and Procedures Rules](#): Detailed rules for Diagnosis & Procedures entries
- [Diagnosis and Procedures Video](#): Video on using Diagnosis & Procedures
- [Breaking Down Diagnosis and Procedures](#): Tips and Tricks recorded Video
- [Diagnosis and Procedures PPT](#): PowerPoint on entering Diagnosis & Procedures

[Back to Index of Topics](#)

Samples and Tests

Samples

Description: Recording Samples and the rules associated with them

Features Available:

- **Feature:** Recording Samples
- **Feature:** Recording Sub-samples
- **Feature:** Recording sample storage locations and usage history
- **Feature:** Reports for Samples

Related Materials:

- [Sample Storage](#): Help document on how sample storage works in zims
- [Sample Rules](#): Help document with rules for samples and sub-samples
- [Sample Quality Assessment](#): Best practices in defining sample quality.
- [Sample Request Report](#): Help document on the Sample Request Report
- [Samples, Tests and Results Report](#): Help document on using the Report
- [Samples Help](#): Help document on creating Samples
- [Samples PPT](#): PowerPoint on creating Samples
- [Collecting Samples](#): Video on collecting Samples
- [Sample Set](#): Video on recording aliquots for a blood product sample

Tests and Results

Description: Requesting Tests and using Test Panels

Features Available:

- **Feature:** Requesting Tests
- **Feature:** Recording Test results
- **Feature:** Using and creating Test Panels
- **Feature:** How to request addition of a new Test

Related Materials:

- [Test Panel Setup](#): Video on setting up your Test Panels
- [Quick Test Results Entry](#): Help document for quick recording of Test Results
- [Tests and Methodologies](#): An Excel list of tests and lab methodologies
- [Samples, Tests and Results Report](#): Help document on using the Report
- [Request Global Test \(WORD\)](#): Submit request forms to support@species360.org
- [Tests and Results Help](#): Help document on Tests and Results ([PPTX Version](#))
- [Test Upload](#): We will offer automatic importing of results from partnering labs, including IDEXX, Gribbles AUS & NZ, and Antech.

[Back to Index of Topics](#)

Physiological Measurements

Description: How to record Physiological Measurements

Features Available:

- **Feature:** What measurements can be recorded
- **Feature:** How to record Physiological Measurements
- **Feature:** How to edit or delete a measurement
- **Feature:** Recording measurements in other Medical modules
- **Feature:** How to upload an Excel file

Related Materials:

- [Physiological Measurements PPT](#): PowerPoint on Physiological Measurements
- [Physiological Measurements Help](#): Help document on Physiological Measurements

[Back to Index of Topics](#)

Prescriptions and Treatments

Animal Prescriptions and Treatments

Description: Using the Prescriptions/Treatment module in ZIMS

Features Available:

- **Feature:** Quick Prescription/Treatment
- **Feature:** Full Prescription/Treatment
- **Feature:** Using the Dose Calculator

Related Materials:

- [Terminating Prescriptions and Add New Full Rx](#): Video on ending prescriptions and adding new full prescriptions
- [Printing Labels](#): Video on how to print labels
- [Prescriptions](#): Video on using prescriptions
- [Treatments and Prescriptions TNT](#): Video of the Tips and Tricks for Treatments and Prescriptions
- [Prescriptions and Treatments PPT](#): PowerPoint for using Prescriptions and Treatments
- [Prescriptions and Treatments Help](#): Help document on Prescriptions and Treatments
- [Animal Lists](#): Help document on creating and managing Animal Lists

Aquatic Enclosure Prescription and Treatment

Description: Using the Aquatic Enclosure Prescription/Treatment module in ZIMS

Features Available:

- **Feature:** Create a Prescription
- **Feature:** Record a Treatment

Related Materials:

- [Aquatic Enclosure Treatment](#): Help document on recording an enclosure treatment

[Back to Index of Topics](#)

Anesthesia

Description: How to use the Anesthesia module

Features Available:

- **Feature:** Basic Anesthesia Information
- **Feature:** Use of additional tabs

Related Materials:

- [Anesthesia Video](#): Video on using the Anesthesia module
- [Anesthesia and Pharmacy Inventory](#): Video of a Tips and Tricks presentation
- [Anesthesia PPT](#): PowerPoint on using the Anesthesia module
- [Anesthesia Help](#): Help document on using the Anesthesia module

[Back to Index of Topics](#)

Necropsy and Biopsy

Description: Recording a Necropsy and entering Biopsy information

Features Available:

- **Feature:** Submitting a Necropsy and remaining tabs in the module
- **Feature:** Automatic Calendar Task for Pathology
- **Feature:** Submitting a Biopsy and remaining tabs in the module
- **Feature:** Relevant Death Information

Related Materials:

- [Relevant Death Information](#): Help document on correctly entering RDI
- [Necropsy and Biopsy PPT](#): PowerPoint on using the Necropsy and the Biopsy modules
- [Necropsy and Biopsy Help](#): Help document on using the modules

[Back to Index of Topics](#)

Husbandry Module Related

Description: The features that are shared between the Husbandry and the Medical modules

Features Available:

- **Feature:** Husbandry module to Medical module
- **Feature:** Medical module to Husbandry module
- **Feature:** Husbandry/Medical modules shared data

Related Materials:

- [Mingling Modules](#): Tips and Tricks PPT on data shared between the ZIMS modules
- [Husbandry and Medical Interface PPT](#): PowerPoint on the data shared between modules
- [Husbandry and Medical Interface Help](#): Help document on the data shared between modules

[Back to Index of Topics](#)

Medical Data Quality

Description: The functionality in ZIMS to help you clean up your medical data.

Features Available:

- **Feature:** Medical Apps help you clean up medical data in a single record or as a batch for dispositioned/dead animals
- **Feature:** Anesthesia Data Quality Search helps you complete anesthesia records
- **Feature:** Relevant Death Information helps you finalize necropsies

Related Materials:

- [Medical Data Quality](#): Help document describing the ZIMS functionality to clean up your medical records

[Back to Index of Topics](#)

Reports and Searches

Reports

Description: The Reports available in the Medical Module

Features Available:

- **Feature:** Finding the Reports
- **Feature:** Report Filters
- **Feature:** Favorite Report Search Filters
- **Feature:** Printing and Exporting Reports
- **Feature:** Overview of the Medical Reports

Related Materials:

- [Reports Index](#): PDF on the reports and the information they provide
- [Medical Reports PPT](#): PowerPoint on all the Medical Reports

Searches

Description: How to do searches within the Medical module

Features Available:

- **Feature:** Finding Animals



-
- **Feature:** Searching with the Modules
 - **Feature:** Type Ahead Lookups

Related Materials:

- [Searching in Medical](#): Help document on searching in the ZIMS Medical module

[Back to Index of Topics](#)

Revised 5 September 2022