

Clinical Notes

Contact Species360 Support

Clinical Notes are free text fields to track in qualitative terms the concerns of the specimen you are treating. In addition, there is an Animal Care Staff Medical Summary note - these details will be shared in the Animal Husbandry notes screens in ZIMS.

Topics:

- There are two formats for Clinical Notes:
 - o <u>SOAP Entry</u> Subjective, Objective, Assessment and Plan
 - <u>Notes/Examinations/Report Entry</u>
- Animal Care Summary (visible on husbandry side of ZIMS)
- Batch Entry
- Mark as Significant
- <u>Mark as Private</u>
- <u>Active Problems</u>
- <u>Associated Tabs</u> (Samples, Phys Measurements, Calendar Tasks)
- Other Actions
- Existing Notes for Same Day
- <u>Note Templates</u>
- <u>Cloning Clinical Notes</u>
- Searching Clinical Notes

SOAP Entry Notes

Using the SOAP entry format helps to standardize medical evaluations.

- **S=Subjective** Your interpretations of what the patient is trying to tell. This can also be the reported history from a keeper
- **O=Objective** Symptoms that can be measured, seen, heard, felt or smelled such as temperature, pulse, and swelling
- A=Assessment Summary and medical interpretation of the significant Subjective and Objective observations and findings. May include diagnosis or preliminary diagnosis of the condition presented.
- **P=Plan -** How you intend to treat the animal.

This SOAP note will display only within the Medical ZIMS module.

Below is an example of a SOAP Clinical Note entry.

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SOAP E Subjective	SOAP Entry ONotes/Examinations/Report Entry Subjective													
B I	Ū	ABC	<u>A</u> •	<u>ab</u> 2 -	Ξ	JΞ	60	Š	ABC					
Appears	Appears very agitated after move from exhibit to holding. Had panicked in crate.													
Objective														
B I	Ū	ABC	<u>A</u> •	<u>ab</u> 2 ▼	:=	ΞΞ	GÐ	Š	ABC					
On exar	On exam pulse is high, swelling behind right ear, very warm to touch.													
B Z	Ū	ABC	<u>A</u> •	<u>ab</u> -	Ξ	ΞΞ	න	Š	ABC -	C				
Possible	Possible contusion behind right ear.													
Plan														
B I	Ū	ABC	<u>A</u> •	<u>*</u> -	Ξ	JΞ	60	Š	ABC					
Keep as	Keep as quiet as possible. Apply cool compresses if allowed. Reassess tomorrow.													

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Notes/Examinations/Report Entry Notes

These notes are not broken down into separate topics like the SOAP entry and would usually be used for shorter notes. For this type of note you will need to select a Note Type.

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Note Type *	
General	*
Select One	
1. General	
2. Surgical Report	
3. Examination	
4. Observation	
5. Medical alert	
6. Medical Consultant Report	
	1.1

If you create a SOAP entry and decide to switch to this type of Note you will receive a message that you cannot easily switch back to a SOAP entry.



Below is how the previous SOAP entry looks when converted to a Notes/Examinations/Report Entry note.

Note Type *							
Examination 👻							
Notes/Comments *							
B Z U AR A ▼ " ™ ▼ ⋮⊟ ⋮⊟ 📟 🐝 🖤 🔲							
Appears very agitated after move from exhibit to holding. Had panicked in crate.							
On exam pulse is high, swelling behind right ear, very warm to touch.							
Possible contusion behind right ear.							
Keep as quiet as possible. Apply cool compresses if allowed. Reassess tomorrow.							

This note will display only within the ZIMS Medical module.

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Animal Care Staff Medical Summary

The Animal Care Staff Medical Summary allows notes that are directed more at the animal husbandry staff than the medical staff. These entries will display in the Husbandry notes for the animal. They are not searched when Clinical Notes are searched.

Entry into Medical module:

-	Animal Care Staff Medical Summary 👔															
F	}	I	U	ABC	A	•	aby	•	2	:=	Ξ	63	È	ABC	•	
Tł	nis a	nima	l has a	a small	contu	sion	behi	nd it	ts righ	t ear. V	Will red	check to	omorro	w.		

Display in Husbandry record:

Det	Details More Details Note & Observation 2 Major Life Event My Transactions										
2	🥲 🜆 Export to Excel 🏆 Export to PDF 🔊 Actions • 📋 Show Group History										
	Date 🔺	Note Type	Note Subtype	Title/Keywords	Note						
	Jul 10, 2019	Animal Care	Medical Note (M)	Clinical Medical Summary Note	This animal has a small contusion behind its right ear. Will recheck tomorrow.						
	Jan 07, 2019	Animai Care			Shifting weight between her fore legs quite a bit this morning. Vet tech drew blood.						
	Jan 06, 2019	Animal Care			Refused her a.m. medications						

These notes cannot be edited or deleted from the Husbandry module and can only be edited or deleted from the Medical record.

Failure!	×
You are not allowed to delete animal care m	nedical note entered through the medical records module.
	ок

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Batch Notes

To help save time you can choose to enter Batch Clinical Notes for multiple animals. There are a few ways to select the records that you want to record multile notes into.

1) Check the Batch Clinical Notes box and type the Local IDs or GANS into the field.

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er animal list:	Please Select	~	•
vide local ids /	GANs for each animal to clinical	note.	_
	after each local id / GA	N:	
AN: 1527730/AT	ELES GEOFFROYI × GAN: 2604	7093/ACRYLLIUM VULT	

2) Use an Animal List.

Batch Clinical N	otes	
User animal list:		~
Provide local ids /	1. gorillas	
CNITED	2. test	
- Citter	3. test2	
Press or		

- 3) Use the advanced search:
 - a. Batch Clinical Note
 - b. Search Glass
 - c. Refine by enclosure/taxonomy ect.
 - d. Select all relevant records (click once, then shift + right click to select a range)
 - e. Select to add search results to the clinical batch note







4) From Animal Search results grid (in Husbandry). Select the animals > Actions for selected animals > Make a simple batch action for selected animals.

When using the first two methods, the Note will be identical in all records. When creating a Simple Batch Note from a results grid you have the option to select a custom note. This means that the Notes recorded in each record can be different.

I	Statis	tics Search Res	sults 🗵					
		ions for selected ani	imal(s)					
I	Your	animal lists	~	🗸 🗸	Scientific Name	Common Name	Sex Type	Last Reported Ho
Create new animal list (for selected animals)					Panthera leo k	African lion	Male	GREENVISC
I				107	Panthera leo k	African lion	Male	GREENVISC
I	Make a simple batch action (for selected animals)				Macrochelys t	Alligator snap	Male	GREENVISC
I	C	pen selected anima	il(s)		Macrochelys t	Alligator snap	Female	GREENVISC
		HSV18-00120	[B18005/GRE	Individual	Gallus gallus	Ameraucana c	Female	GREENVISC
I	☑ 🖸	8134226	[XCA008/GRE	Individual	Alligator missi	American allig	Female	ALLIGATOR
I	☑ 🕢	HSV17-00106	[R17045/GRE	Individual	Alligator missi	American allig	Male	GREENVISC
I	I	8134224	[XCA006/GRE	Individual	Alligator missi	American allig	Female	ALLIGATOR
		MIG12-29524	[M11005/GRE	Individual	 Panthera pard	Amur leopard	Female	GREENVISC

If you want to include a list of records the Note went into in each record, select the Include Local IDs in Note checkboxes as appropriate. The Local IDs will appear at the top of the Note. For a SOAP entry they will display only in the Subjective grid. It is

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recommended that you add your Note text in front of this Note so that the text will display first in the Details column of the Notes grid.

M08005 / RED PANDA / MIG12-29858215 x M16031 / AMUR LEOPARD / MIG12-28443030 x 880212 / SIAMANG / MIG12-29858192 x M18010 / SUMATRAN ORANGUTAN / HSV18-00131 x									
 ✓ Include Animal Local IDs in Clinical Note ✓ Include Animal Local IDs in Animal Care Staff Note 									
Date * Time * Note Author *									
Jul 11, 2019 🔲 00:00 Please Select 💌									
Mark as Significant Mark as Private 🖓									
SOAP Entry Notes/Examinations/Report Entry									
Note Type *									
General 🔻									
Notes/Comments *									
B Z ∐ ↔ A ▼ 🖑 ▼ ∠ 🗄 🗄 🖙 🐝 🖑 ▼ 🗐									
Add the note in front This note added to the following animals: M18007, M15008, M15007, M14003, M17001, M16025,									
Animal Care Staff Medical Summary 🦓									
<u>B / <u>U</u> ↔ <u>A</u> → <u>B</u> → <u>A</u> → → </u>									
Add the note in front This note added to the following animals: M18007, M15008, M15007, M14003, M17001, M16023,									

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Mark as Significant

1) You can also choose to mark a Note as significant by checking the "Mark as Significant" checkbox.

2) Notes marked as significant will display with a red "!" icon so they are easily located in the grid. Marking a note as significant is similar to marking an email as High Importance. It is not something you should use often but is an indicator that this note contains something of significance.



		1					
			- Batch Clinical Note	5			
			Animal ID *		Date	•	Tin
		Animal	101167 / Western Iowlan.	.x) P	Mar	12, 2014 🖪	00
3 Mar	12	2, 2014	Mark as Significa	1	🗌 Mai	rk as Private	Q
-		100537 / We	stem lowland norilla / MIG12-2	dar 12	2014	SOAP What	
-		101167 / Wes	stem lowland gorilla / 9789948	Mar 12	2014	SOAP What	
-		101167 / Wes	stem lowland gorilla / 9789948	Mar 12	2014	General: This	
		101167 / Wee	stem lowland gorila / 9789948	Mar 12	2014	SOAP: TEM	
6	ine	ificant P/W	viand gorilla / MIG12-299	Mar 12,	2014	General: This	
1	ř	103080 /	and gorilla / MIG12-299	Mar 12,	2014	SOAP: What	
(1270 / Wes	and gorilla / MIG12-29858	Mar 12,	2014	SOAP: What	
(1270 / Weste	ern lowland gorilla / MIG12-29858	Mar 12,	2014	General: This	
(5	1833 / Weste	ern lowland gorilla / 4769066	Mar 12,	2014	General: This	
(1833 / Weste	ern lowland gorilla / 4769066	Mar 12,	2014	SOAP: What	
0 (1833 / Weste	ern lowland gorilla / 4769066	Mar 12,	2014	SOAP: TEsti	
0 (437 / Western	n lowland gorilla / 26659459	Mar 12,	2014	SOAP: TEsti	
0 (570 / Western	n lowland gorilla / 6896215	Mar 12,	2014	SOAP: TEsti	
) Mar	11	l, 2014					
(5	100002 / Cor	mmon zebra / MIG12-29614492	Mar 11,	2014	General: Note	
) Mar	05	5, 2014					
	1	100002 / Cor	mmon zebra / MIG12-29614492	Mar 05,	2014		
(5	22 / Parma w	vallaby / PLT14-00629	Mar 05,	2014	General: Add	
	1	22 / Parma w	vallaby / PLT14-00629	Mar 05,	2014		

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Mark as Private

Checking the "Mark as Private" checkbox means that, even if you decide to share other Clinical Notes on the animal with another institution, this Note will not be shared. It does not mean that the Note is private to the person who entered it. It does mean that it is private to your institution and if other staff members have access to view Clinical Notes they will see it.

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Active Problems

When you add a new Note all Active Problems are associated with that Note by default. However, there can be active problems such as old chronic issues where the current note is not relevant. If the problems are not associated with the Note, simply uncheck them. This Note relates only to the lenticular sclerosis and mild trauma. You cannot associate a note with a problem that is Inactive on the date of the note. If you want to create a new diagnosis You can select the "Create New Clinical Diagnosis" button and

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you will be taken to that screen.

Animal ID *	Date *	Time * 08:05 AM	Note Author * Jeff Bush 🛛 💙	Active Problems AZOTEMIA ANEMIA V LENTICULAR SCLEROSIS TRAUMA, MILD, SUBCUTANEOUS, CHRONIC, RENAL DISEASE HEART MURMUR, SYSTOLIC, FOCAL	Create New Clinical Diagnosis
Mark as Significant	🗌 Mark as Private 🤇	Ŷ			

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Other Tabs Activate

If you select Save & Edit, the remaining tabs become active where you can record Samples, Physiological Measurements or create Calendar Tasks. If you select Save & Close, the Note will be saved and the data entry screen closed. The next time you open the Note record the other tabs will be active. Return to index

Additional Actions

Export to PDF, Edit or Delete the Note, highlight the appropriate Note in the grid as above. Then select the action you wish to take above the viewing pane as below. You can also open the edit screen by left clicking on the Note in the dashboard.

🖃 Jul 01, 2012								
Doctor Mew / Ar	merican shorthair cat /	SZT14 Jul	01, 2012	SOAP: History: Doctor Mew is a 8 year old			🧃 Sonja Hendrick	
Doctor Mew / Ar	merican shorthair cat /	SZT14 Jul	ZT14 Jul 01, 2012 General: Serum color		or: straw Profile-Azote 🧃		Sonja Hendrick	
CEXPORT TO PDF	lit 🔀 Delete 🎲 V	/iew Sample	View Measure	z ement			🗖 Maxir	mize
GAN	Local ID	Taxonomy			Sex	Birth Date	Age	~
G SZT14-00001	COR1	Felis catus ame	erican_shorthair/	America	Male	Jun 01, 2005	7Y 3M 6D	
Date	Time		Note	Author				
Sep 07, 2012 08:05:00		Jeff Bush						
Significant	Private		Activ	e Problems				
No	No			ZOTEMIA				

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Existing Notes for Same Day

If you have already recorded a note in the animal record and you select to add another one for the same date, you will receive a screen displaying any other Notes that you recorded today for that animal. You can select to "Continue to add/edit context note" and you will be taken to the Add Clinical Note screen. Or, you can select to edit that highlighted Note. This helps guard against duplicated Note entries.

Existing clinical note(s) on Mar 12, 2014!							
Date	Detail		Reported By				
Mar 12, 2014	General: Subjective	Abdominal	Adrienne Miller				
Mar 12, 2014	General: Subjective	Very agitat	Adrienne Miller				
				_			
	Continue to add/edit c	ontext note	Edit selected no	ote			
	te(s) on Mar 12, 2 Date Mar 12, 2014 Mar 12, 2014	te(s) on Mar 12, 2014! Date Detail Mar 12, 2014 General: Subjective Mar 12, 2014 General: Subjective	te(s) on Mar 12, 2014! Date Detail Mar 12, 2014 General: Subjective Abdominal Mar 12, 2014 General: Subjective Very agitat Mar 12, 2014 General: Subjective Very agitat	te(s) on Mar 12, 2014! Detail Reported By Mar 12, 2014 General: Subjective Abdominal Adrienne Miller Mar 12, 2014 General: Subjective Very agitat Adrienne Miller			

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Note Templates

Note Templates help to make sure that you gather all the information you want on a specific topic. Note Templates can be created and managed from within the Animal Husbandry animal record or the Medical animal record. If you have Note Templates created already they will appear in the drop down list to select and use. If you wish to create a new one, simply type the information into the Note box and select the Save icon. To manage the templates, select the wheel icon. Because you created the Template from within Clinical Notes, it will by default be a Clinical Note Template.

Note Type *	Please Select	~		ds	Note	
Note Sub Type	Please Select	*		ponder Note	Legacy SL	.ocatio
Note				t	1.1 Africar	n Wild I
	Note Templates 💉 🤅	ම 🛃 🖓		nt Comment	within norr	nal ran
B I <u>U</u> AB€	A • 🕸 • 🖉 🗄 🗄	ରେ ଖୁଁ	For mana	iging templates click 🔘 icon.		onthi
ABC 📄			For savin	g the written text as template click	🛃 icon.	wild d
Record the informativ	on you want included in the Note			Avorming	1.1 #1025	73/#10
Record the information	on you want included in the Note			tment	0.1 # 1029	58 °Ri
		\sim		2	1.1 #1025	73 "Pa

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Note Templates can also be created and managed from the Start Menu > Tools > Manage Note Template. The grid will display the type of template (left column), whether it can be edited by others and if it can be used by others.

🛃 M	anage Not	e Template			? _ = =
1	🔶 Add ne	w template Ň Edit selected template	X Delete selec	cted template	
		Name	Editable	Shared	Detail
\odot	CN	Snake transmitter surgery	V	V	Proc: Transmitter placement, microchip Restraint: Snake ma
\odot	CN	Snake Transmitter (Mike)	V	×	Proc: Transmitter placement, microchip Restraint: Snake m
\odot	CN	Routine exam mammal	×	×	Proc: Routine examination, CBC/Chem, rables vaccination Hx: Ke
\odot	CN	Routine avian exam	×	×	Proc: Routine examination, CBC/Chem, vaccination (West Nile) Hx
\odot	CN	Rattlesnake sampling - Local block	8	8	Proc: Sample collection for Timber rattlesnake health survey Snake
\odot	CN	Quarantine - Arrival	V	~	Arrival into quarantine **** arrived into quarantine from ****
\odot	TRN	Negative Fecal Pathogen Culture	V	×	No Salmonella, Shigella, Pleisiomonas, Edwardseilla, Aeromonas o
\odot	CN	NEC Processing KW	×	×	Proc: Pre-release examination, eartag, microchip, DNA sample, par
\odot	CN	NEC Exam (Juvenile)	×	×	Proc: NEC Pre-release Protocol Restraint: Animal induced in cham
•	CN	NEC Exam (Adult)	V	V	Proc: Adult NEC Intake Protocol Restraint: Animal induced in cham
\odot	CN	Fecal culture	V	8	Results: Fecal culture Fecal culture was negative for enteri

Below we are creating a new Note Template for an animal's first exam after birth or hatch. The Name should be unique. You will need to select the Template Type from the dropdown list. This template will ONLY be available for the type of note selected. This template will be shared with others, that means other staff members can use it. However, it is not editable by any other staff members other than its creator. In the Template Text record what information you want to collect in this type of note. HINT: when creating lists such as this example, use Shift/Enter to avoid extra spacing between the lines.



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Cloning Clinical Notes

You can clone Clinical Notes to easily enter similar information. Both SOAP and Notes/Examination/Report Entry type notes can be cloned. You can also clone clinical notes for a single animal, group, or batch clinical notes.

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To clone a note, select the desired note (1), then click the Clone button (2).

		Animal	(2 Records)	Date	Details
P	01/24/	/2022			
1	Ð	101 / Red panda / ISS21-01134		01/24/2022	General: Manual restraint for routine exam and sample collection. Physical exam findings were unremarkable. Appears to be in good general health.
	Ð	102 / Red panda / ISS21-01138		01/24/2022	General: Manual restraint for routine exam and sample collection. Physical exam findings were unremarkable. Appears to be in good general health.
				2	
7	Export	to PDF 🛛 🔪 Edit 🛛 🗶 Delete	🇞 View Sampl	e 🕘 Clone Note	View Measurement

The cloned note will copy everything from the selected Clinical Note, except for the animal ID. This needs to be re-entered, you can choose to enter just one ID or use the batch function to assign the Clinical Note to multiple entries. You can now make any edits you need before saving as usual.

Add Clinical Note										
Basic Info Samples Physiological M	Measurements Calendar Tasks									
🚽 Save & Edit 🛛 🚽 Save & Close 🥠										
- Batch Clinical Notes										
Animal ID *	Date * Time *	Note Author *	Active Problems							
Search by Identifier/GAN	01/31/2022 00:00	Species360								
Mark as Significant] Mark as Private 😲									
◯ SOAP Entry	Notes/Examinations/Report Entry									
Note Type *										
General 👻										
Notes/Comments *										
B I ∐ AB€ <u>A</u> → a	🖢 - 🖉 🗄 🗄 📾 💥	ABC - 🔲								
Manual restraint for routine exam and sample collection. Physical exam findings were unremarkable. Appears to be in good general health.										
Animal Care Staff Medical Summ	nary 🖓 —									
B I ∐ ABC <u>A</u> ▼	<u>▶</u> • 2 🗄 🗏 📟 💥	ABC - 🗐								
Manual restraint for routine exam Physical exam findings were unren Appears to be in good general hea	Manual restraint for routine exam and sample collection. Physical exam findings were unremarkable. Appears to be in good general health.									

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Searching Clinical Notes

1) Selecting Clinical Notes from the lower left panel will bring up the Simple Search for Clinical Notes.

2) Selecting Advanced Search

3) will add the fields to search by Problem or Taxonomy

	•				
Dashboard		Clinical Notes Simple Search	-	Clinical Notes Advanced Search	
Select animal to see detail		Date Pange			
a 📪 Records 🌱 📰		from to		Date Range	
Clinical notes				to	
Diagnoses & Procedures					
Treatments/Prescriptions					
Samples (1)		Animal			
A rest a result		Please select		Animal & Problem	
Physiological measurements (1)				Animal	
Diagnostic imaging		Note Author		Plazes coloct	0
Necropsy/Diopsy		Please Select		Please select	~
🖌 🗐 MIG12-29614492 💦 🔀 📰				Problem	
Clinical notes (4)		Clinical Note Subtype		Tobicin	_
Diagnoses & Procedures (3)		Please Select		Please Select	~
Treatments/Prescriptions (2)					_
Samples (2)		Search in Notes			
K Tests & Results				Note Author	
Strainford manufacture (11)				Please Select	~
Diagnostic imaging					
Necropsy/Biopsy				Clinical Note Subtype	
				Please Select	~
			1	Search in Notes	_
				Taxonomy	_
				nu kononny	
				Please select	P
				Include Taxon Below	
Dashboard				L	
Clinical Notes					
Diagnoses & Procedures		🔅 Resetℜ 🥥 ea	rch		
O Treatments/Prescriptions		Clinical Notes Advanced Se	1		
16 Samples		Dashboard			
Tasks & Danuts	1				

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