

## SHARING ZIMS for MEDICAL RECORDS WITH A VET ADVISOR

Species360 has created a secure way to share data with a new institution category “Global/Regional Consortium”. This institution category does not hold or own any animals but is used to view information on animals or species voluntarily shared with the institution.

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### Getting Started

Vet Advisor institutions approved by the Regional Associations have been set up to allow **Species360 Members to voluntarily share their data directly with the vet advisor for the species/program**. Members maintain control of their level of sharing and can choose to share, or stop sharing, at any time. **The ownership of the data will stay with the institution entering the data, and the vet advisor will only have read-only rights to the shared data and must adhere to ZIMS data sharing and Regional Association confidentiality protocols. Vet advisors who are no longer in their role will have their ZIMS access deactivated by the Regional Associations.**

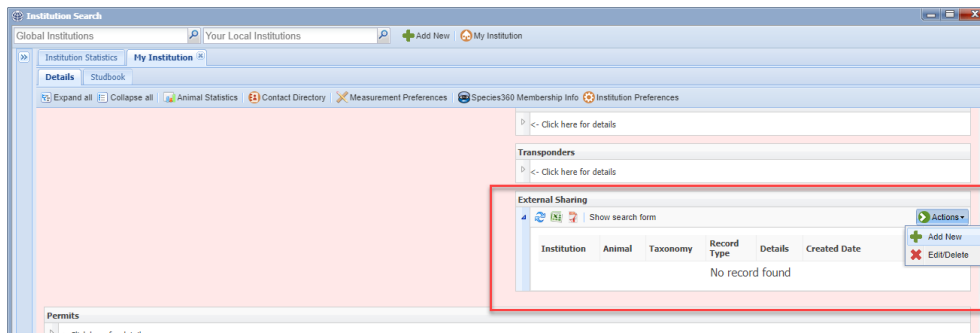
This concept has been tested within the community with the Vet Advisor Data Sharing Pilot project and is already in active use by the EAZA Biobank. Members using this new way of sharing have found it to be useful and had trust and confidence in the concept.

You can participate and share your data with the vet advisor institution by choosing to either share the data for the entire species or share the data for specific individuals. Sharing data for an entire species/program is the least amount of effort on your part, as you will only need to create the external sharing record once, and then all new births and acquisitions for the **species/program** will be automatically shared with the vet advisor institution. If you choose to share specific individuals, you will need to enable sharing for each animal record separately, and you will need to enable sharing for new births/acquisitions to keep the data set as current as possible.

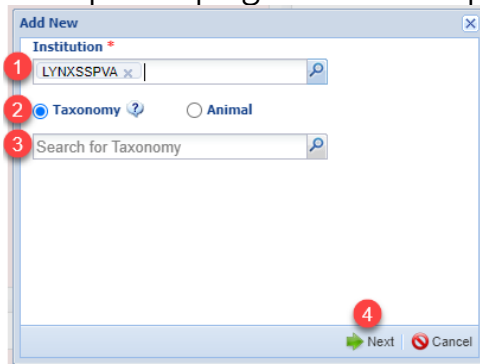
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### How to Share

A single animal or an entire taxonomy can be shared from My Institution (Start>Institution>My Institution) in the External Sharing grid. To share a new animal or taxonomy, click Actions > Add New



1. Select the institution you want to share records with by entering the mnemonic for that species' program. For example, "Lynxsspva" for the Canada Lynx program.



If you need to find a program mnemonic, use the following steps:

Start> Institution> Institution Search> Enter Program name in Search box in top left-hand corner.

For example: Canada lynx =

2. Select the Taxonomy radio button to share records for an entire taxonomic group.
3. Type in the taxonomy of the species, "Canada lynx" in our example. Or you can instead check the "Animal" radio button to only select one animal's record, not all animals held of that species/group, and enter that animal's GAN #.
4. Then click "Next".



5. Choose whether you want to share your Husbandry and/or Medical records (both are recommended). (Note, you will need to have the correct roles to perform these actions, e.g., Local Admin to share husbandry records and Medical Admin to share medical records or custom roles)
6. Click Save.

The sharing will appear in the External Sharing grid for the animal record and My Institution.

Institution	Animal	Taxonomy	Record Type	Details	Created Date	Created By
LYNXSSPVA		Lynx/Lynx	Medical, Husbandry		12/01/2022	

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You can also share a single animal record from within the animal record Details tab in the External Sharing grid (Start>Animals>Search>Open Record>Bottom of Details tab). To share a record, click Actions > Add New

As you have already specified the animal, you will only need to choose which institution to share the record with "by typing in the vet advisor institution mnemonic associated with that species. For example, again we have chosen “Lynxsspva” for the Canada Lynx program.

You will only need to choose which institution to share the record with, and whether to share Husbandry records, Medical Records, or both.

You will need to repeat this step for all animals you wish to share and for any new births and acquisitions.

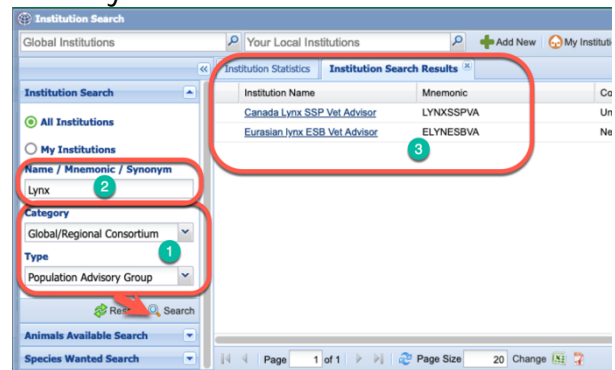
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## How to Search for All Vet Advisor Programs

### From Institution Search

In ZIMS (Start>Institution>Search) you can search by:

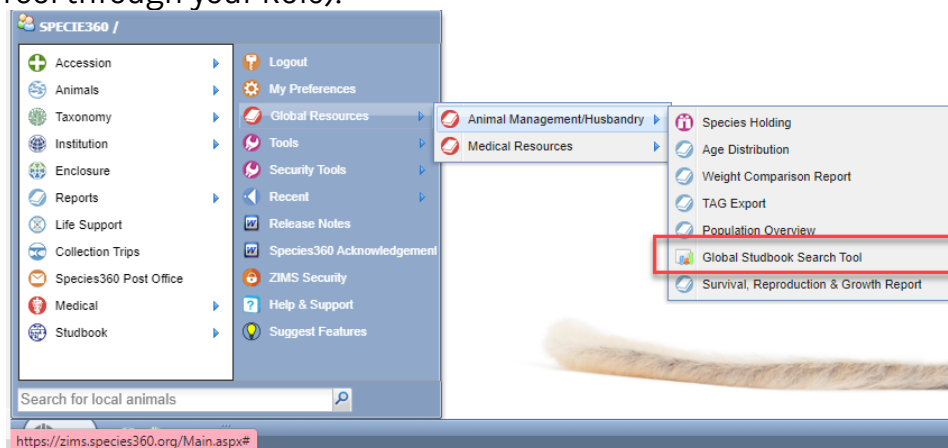
- 1) Category Type = Global/Regional Consortium and Type = Population Advisory Group
- 2) To limit the results, you can try to add a species name, for example, Lynx,
- 3) Then Search for matching vet advisory results – these are the ‘institutions’ that you are sharing your records with – regional/global vet advisors are provided accounts at these special institutions to conduct their consultancy data reviews.



### From the Global Studbook Search Tool

This tool allows you to search for species you hold in specific studbooks. Only Studbooks currently managed in ZIMS for Studbooks will be found.

The tool is accessed from the start menu under Global Resources > Animal Management/Husbandry > Global Studbook Search Tool (you must have access to this Tool through your Role).



To search for the species you hold in specific studbooks, you will use the “Taxonomy Held By” and “Scope” filters.

The screenshot shows the 'Global Studbook Search Tool' interface. On the left is a search sidebar with sections: 'Taxonomy' (with a search box), 'Taxonomy Held By' (with a dropdown menu showing 'SPECIE360' selected), 'Scope' (with a dropdown menu showing 'AZA' selected), 'User Assigned' (with radio buttons for 'Name' and 'Institution'), 'User Title' (with a dropdown), and 'IUCN Status' (with a dropdown). At the bottom of the sidebar are 'Reset' and 'Search' buttons. On the right is a table titled 'Taxonomy Held By SPECIE360, AZA: 1 Studbook'. The table has columns: 'Studbook Name', 'Studbook Keeper', 'Studbook Keeper Email', 'Studbook Keeper Institution', 'Scope', 'Living Animals', 'Current Holders', and 'IUCN Status'. The table lists five species: 'Dove, Black-naped Fruit (Ptilinopus melanospilus)', 'Dove, Grey-Capped Emerald (Chalcophaps indica)', 'Dove, Mindanao Breeding Heart (Gallinula crinigera)', 'Dragon, Komodo (Varanus komodoensis)', and 'Flamingo, Greater (Phoenicopterus roseus)'. Each row includes the species name, the studbook keeper's name and email, the institution, the scope, the number of living animals, the number of current holders, and the IUCN status. Red numbered callouts are placed on the interface: 1 points to the 'Taxonomy Held By' dropdown, 2 points to the 'Scope' dropdown, 3 points to the 'Search' button, and 4 points to the table header.

1. In the Taxonomy Held By box – type your institution.
2. In the Scope box – type in the Regional Association you are a part of (e.g., AZA to search all SSPs)
3. Click Search
4. You will now see a list of all the species you hold which are part of a studbook (within the Regional Association you searched).

You can now use this list to set up external sharing with all the species.

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