
USING ZIMS AS A VET ADVISOR

How to view medical records that are shared with you by ZIMS institutions.

Contact support@Species360.org

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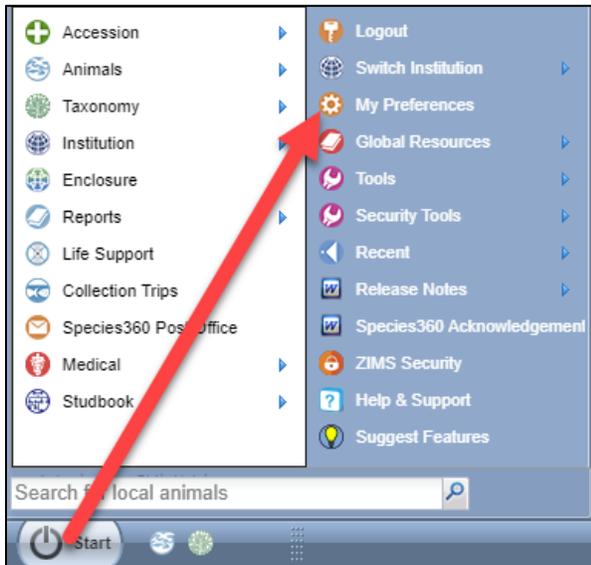
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Getting Started

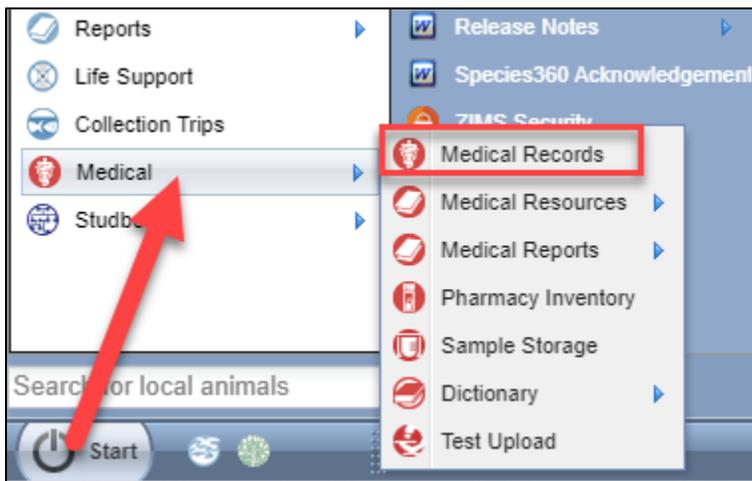
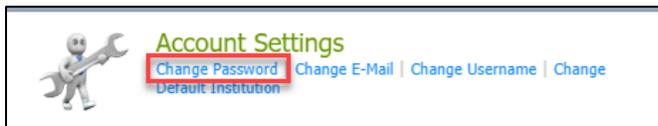
After you have been approved to be a vet advisor by the regional associations (eg. AZA, EAZA, ZAA, etc) and you have signed any confidentiality or data-sharing agreements required by the regional association, Species360 will set you up with an institution and a ZIMS Username and Password. Before you can log in to ZIMS you must first confirm your Email address. You will receive an Email notice to walk you through this simple process.

Once you have confirmed your Email, open ZIMS at <https://zims.species360.org>. Enter your Username and Password as given to you. If you did not receive a Password, use the link to reset your Password on the login screen.

If you already have a Species360 ZIMS Account, you will have the ability to use this account to switch between the Vet Advisor access and your local institution (under the Start Menu > Switch Institutions option).

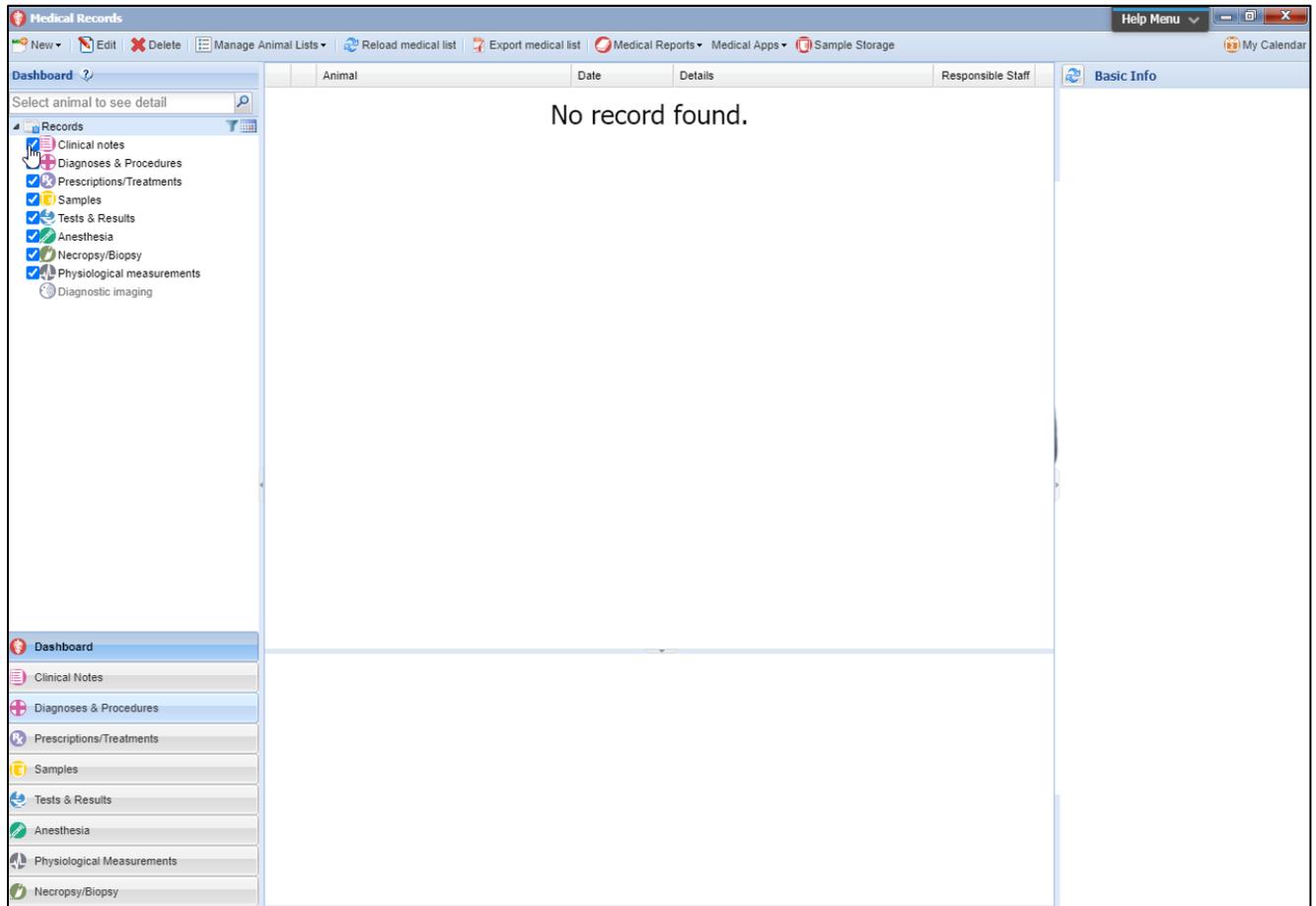


For security reasons, we recommend that you reset your Password if you did not do so the first time you logged in. You can reset it the next time you log in or go to Start > My Preferences. Under Account Settings, select Change Password. Type in your Current Password as provided and then type your desired Password. You can also change your Username here if you want.



You should then confirm that you have access to ZIMS for Medical. Go to Start > Medical > Medical Records. To save time later, you can left-click and drag Medical Records to your desktop for quick and easy one-click access. The ZIMS Role you have been assigned is a Read Only Role. You will be able to search and view data, but you will not be able to add, edit or delete any data.

The medical dashboard will be empty because this filter is currently set for local records only and you are not creating new records, only viewing shared records. You will need to use the [search features](#) to view shared records.



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Notes on External Sharing

When your institution was created, Species360 turned on the ability to externally share medical records. Although you will not have any medical records of your own, both institutions (the one sharing and the one being shared with) must have this functionality turned on for it to work. Medical records have four levels of sharing:

- Gold: All medical records, except those Notes marked as private, are shared
- Silver: Anesthesia, Physiological Measurements, Medical Issues/Diagnosis, Treatment, Health Status, and Pathology (Necropsy/Biopsy) records are shared
- Bronze: Anesthesia, Physiological Measurements, and Pathology (Necropsy/Biopsy) records are shared
- No Sharing: No records are shared.

Because of these sharing levels, what you see in one institution’s records may be more or less than what you see in another institution’s records because the records are shared at the lowest common sharing level between the two institutions. Your institution has

sharing assigned at the Gold level, but if the institution sharing with you is only sharing at the Bronze level, those are the only medical records you will be able to see.

For full details on External Sharing see [Global Data and External Sharing](#).

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Recruiting Members to Share

You will need to recruit Species360 members to share data with your Vet Advisor population advisory group (the institution created specifically for you and your species). You will need to find what institutions hold the species of interest. There are two ways to do this.

One way is to search **Species Holding**. This resource displays animals currently held by the region. Species Holding is found under Start > Global Resources > Animal Management/Husbandry > Species Holding and also as a desktop icon.



1. Enter your desired Taxonomy. If Show Subtaxa Separately is checked, you must run the report at the Genus level or below. If it is not checked, you can run at a higher Taxonomic level.
2. Select the scope filter desired.
3. What is selected for scope drives this field. We checked Association so the drop-down list is zoological associations. If we checked Continent the drop-down list would be Continents. These are single-select lists.

The report with Show Subtaxa separately unchecked (allowed to run at a higher taxonomic level):

Species holding report for: Macropodidae / Wallabies & kangaroos								
Association: Japanese Association of Zoos and Aquariums (JAZA)								
All 6 Institutions, 1 Regions	65	95	11	0	0	0	0	171
Family: Macropodidae / Wallabies & kangaroos								
All 6 Institutions, 1 Regions	65	95	11	0	0	0	0	171
Institution	Male	Female	Other	Birth (last 12 months)	Group M.	Group F.	Group O.	Total
Region: Asia 6 Institutions, Male: 65, Female: 95, Other: 11								
CHIBA SHI / Chiba Zoological Park	4	8	2	0	0	0	0	14
HIGASHI M / Saitama Children's Zoo	15	32	0	0	0	0	0	47
SAPPORO / Sapporo Maruyama Zoo	2	3	0	0	0	0	0	5
TOKYOTAMA / Tama Zoological Park	27	30	5	0	0	0	0	62
TOKYOUENO / Ueno Zoological Ga...	2	4	2	0	0	0	0	8
ZORASIA / Yokohama Zool. Garde...	15	18	2	0	0	0	0	35

The report with Show Subtaxa separately checked (must run at Genus level or below):

Species holding report for: Macropus / Wallaby/kangaroo/wallaroo								
Association: Japanese Association of Zoos and Aquariums (JAZA)								
All 6 Institutions, 1 Regions	59	87	11	0	0	0	0	157
Species: Macropus giganteus / Eastern grey kangaroo								
All 3 Institutions, 1 Regions	8	15	4	0	0	0	0	27
Institution	Male	Female	Other	Birth (last 12 months)	Group M.	Group F.	Group O.	Total
Region: Asia 3 Institutions, Male: 8, Female: 15, Other: 4								
CHIBA SHI / Chiba Zoological Park	4	8	2	0	0	0	0	14
SAPPORO / Sapporo Maruyama Zoo	2	3	0	0	0	0	0	5
TOKYOUENO / Ueno Zoological Ga...	2	4	2	0	0	0	0	8
Subspecies: Macropus giganteus giganteus / Northern grey kangaroo								
All 1 Institutions, 1 Regions	11	18	0	0	0	0	0	29
Institution	Male	Female	Other	Birth (last 12 months)	Group M.	Group F.	Group O.	Total
Region: Asia 1 Institution, Male: 11, Female: 18, Other: 0								
HIGASHI M / Saitama Children's Zoo	11	18	0	0	0	0	0	29
Species: Macropus parma / Parma wallaby								

The Institution is a hyperlink into the Institution record which will hopefully provide you with contact details. The numbers under the sexes will open a results grid where you can go directly into the animal record.

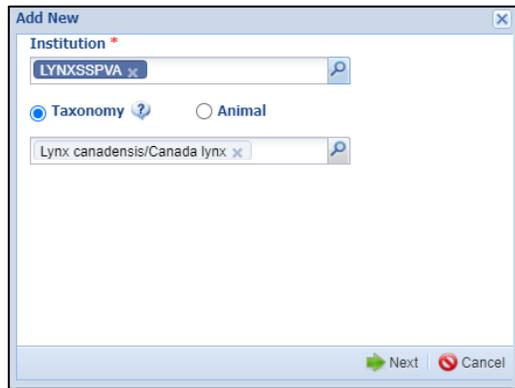
The second way is to use the **studbook**. If you have been granted a role to view the studbook by your regional association, you will be able to look up the living and historical animals, quickly see any deaths reported, view pedigree reports, and run institution holdings reports viewing the institutions that have held the species over the years. This information will assist you in reaching out and requesting an institution's veterinary records be shared with your Vet Advisor institution. If you do not have access to view the studbook, please reach out to your studbook keeper and regional association to request a

studbook role for your program. The advantage of using the studbook is that Species Holdings displays only current holdings. If an institution held the species ten years ago but no longer does, it will not be found using Species Holdings.

With your initial contact from Species360, you should have received a sample letter inviting [ZIMS member institutions to share medical records with you](#). If you do not have it, contact Support@Species360.org and we will send you a copy. Please contact the regional association's committee for other questions on the vet advisor program.

If your recruited institution does not know how to share a record, you can give them this quick step-by-step instruction (number 5 in [Global Data and External Sharing](#) if they want more information).

- A single animal or an entire taxonomy can be shared from My Institution > External Sharing > Actions > Add New.
 - Select the institution that they want to share the record with. Select Taxonomy or single Animal Record. Below we are sharing all Canada lynx records with the Canada Lynx SSP Vet Advisors. Sharing by an entire taxonomy is recommended for the least amount of upkeep to continue sharing all new acquisitions and births.



- A single animal can be shared from within the animal record Details tab > External Sharing > Add New. A taxonomy cannot be shared from within the animal record.



- From both approaches they then select what records they want to share - Husbandry, Medical, or both (recommended). Only their Local Admin can share Husbandry records and only their Medical Admin can share medical records unless they have created custom Roles with this access.



The sharing will appear in the External Sharing grid for the animal record and My Institution. Only the medical records for the sharing institution will be visible to you. If the animal has been at more than one institution, they will have to share with you to see their medical records.

Institution	Animal	Taxonomy	Record Type	Created Date
LYNXSSPVA	-	Lynx/Lynx	Medical	Aug 17, 2020

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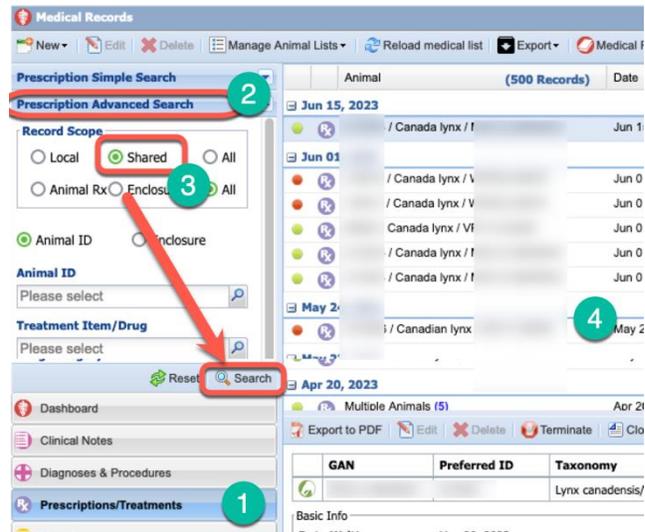
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Searching for Shared Records

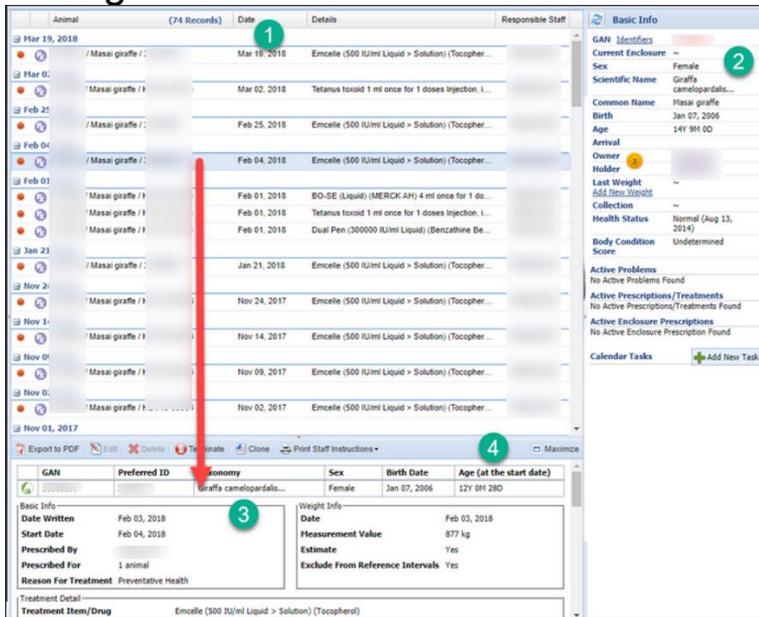
Once institutions begin sharing their records, you will need to find them. There are three search options.

One way is to use the **medical search bars** on the lower left part of the ZIMS for the Medical Dashboard

1. Select the desired module. Below we selected Prescriptions/Treatments
2. Select the Advanced Search option found directly below the Simple Search filters.
3. Click the radio button for Shared records and complete any other filters you want for the search. Then click Search.
4. View the shared records in your list.



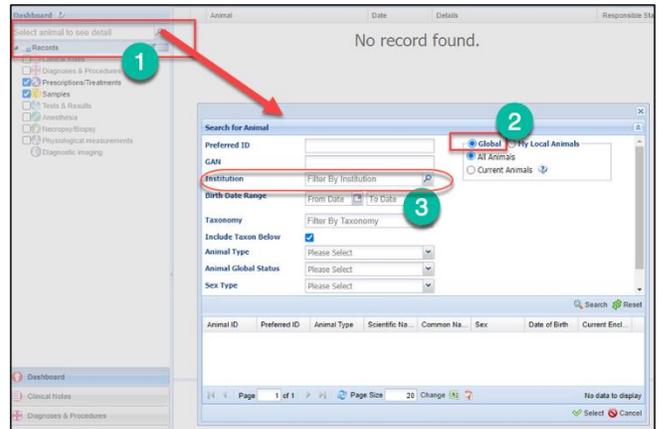
Viewing Records



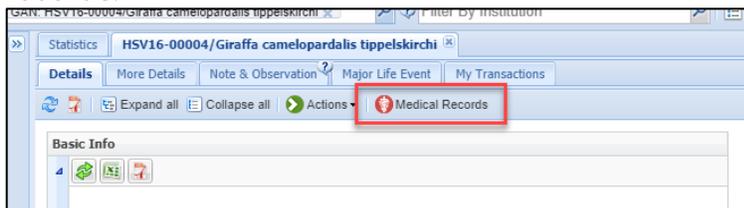
1. The main Dashboard displays the records found that match the filters you entered in your search.
2. The right-hand side Basic Info gives some information about the animal. Much of this information is sourced from the Husbandry record.
3. The highlighted record details in the dashboard are displayed at the bottom.
4. To view the entire record, select the Maximize button.

To find records for a specific animal, you can use the lookup option in the **Select Animal to See Detail** field in the left-hand medical dashboard.

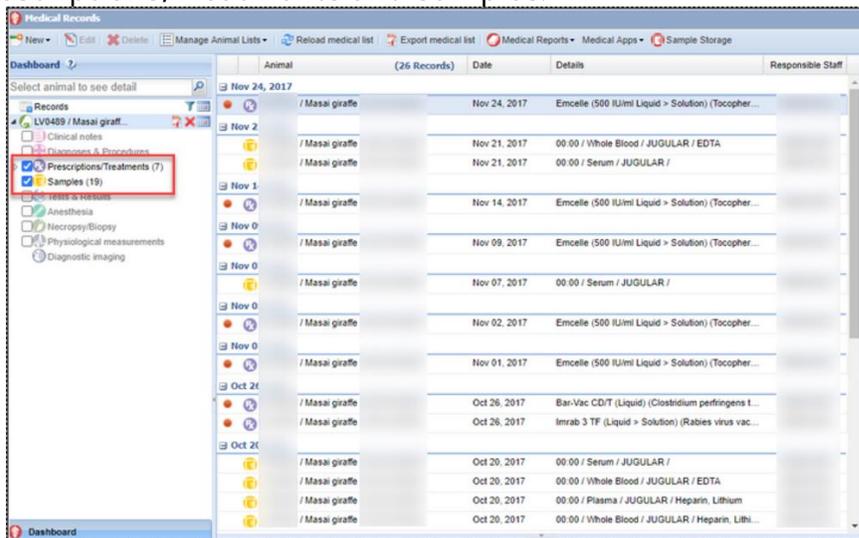
1. Use the magnifying glass to open the search filter screen.
2. Remember to select the Global radio button.
3. If filtering by the Preferred ID (usually the Local ID or House Name) you should associate it with an Institution to get the specific animal you want. Using the GAN (Global Accession Number) will return a single result without being associated with an Institution.



This will open the Husbandry record. Select the Medical Records tab to view the medical records.



The left-hand dashboard is now activated and allows you to limit what medical records are displayed in the main dashboard. Below we have opted to display only Prescriptions/Treatments and Samples.



The third way to search also allows you to find a specific animal record from the **Husbandry** module. Open the Animals module (Start > Animals > Search or select the desktop icon).

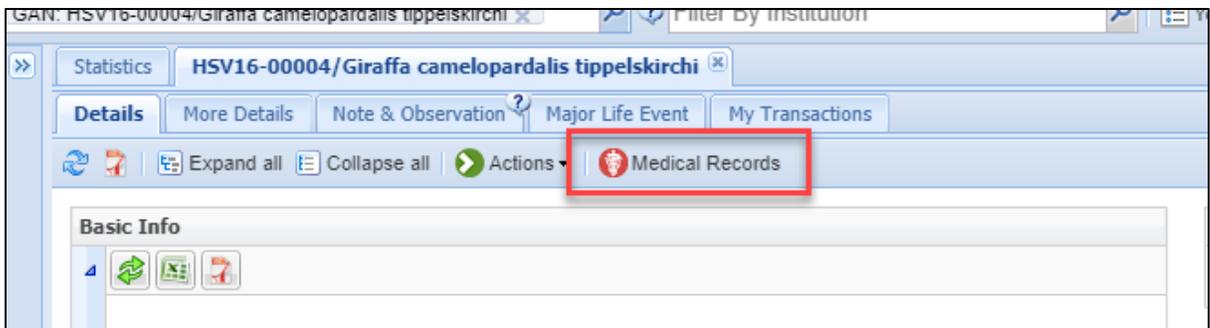
1. In the upper left-hand corner, you can Search Animals by Identifier (Local ID, tag, band, transponder for example) or GAN (Global Accession Number) and Institution. Selecting Institution helps to narrow the search if an Identifier other than the GAN is entered, but it is not required. The Institution should be entered before entering the Identifier.



Below we are searching for an animal at the Greenville Zoo with a Local ID of M16004.



2. Any matches found will display. Select the desired match to open the Husbandry record. Select the Medical Records tab.



Medical Reports and Medical Exports are currently restricted to only local data and will not display shared data. So, you will only be able to view shared records via the search at this time.

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Using the Global Medical Resources

You may also consider reviewing the Global Medical Resources for your program species. These resources are derived from over forty years of medical data contributed by our member institutions. Go to Start > Global Resources > Medical Resources

- Anesthesia summaries
 - A species-level summary of the injectable drug combinations and dosages used to anesthetize animals.
- Drug Usage Extracts
 - A summary of drug and vaccine usage information
- Test Results
 - Search by Test to see ALL the results for a test by species, this is useful for less commonly run tests where there is not a lot of data to compare. This can include results from animals with abnormal health status.
 - Search by Expected Test Results to view the reference calculations from animals with normal health status.

Morbidity and Mortality Analysis

- Most common clinical issues- Clinical diagnosis entered by the veterinary team.
- Relevant Death Information- a broad grouping of data entered as part of the death event or when finalizing a necropsy. This is a shared data field between husbandry and medical users.
- Search by Diagnosis- currently will only show local data, so it will be blank for Vet Advisor institutions. This will be upgraded to a global scope by early 2021 so you may then view all the diagnoses recorded for your program species.

For a PowerPoint with more details on using the Global Medical Resources see [Global Medical Resources](#).

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