MEDICAL RECORDS SEARCH DETAILS

Detailed explanation of the search options available in ZIMS Medical and what information is returned for each search field.

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Finding an Animal
To find an animal in the Medical module use the search box in the upper left hand Dashboard. As you start typing, ZIMS will display matches that it finds. As you type the matches will get closer to what you are looking for. This is a Type Ahead Lookup field and is discussed in greater detail in that section below. In this field you can type the GAN, Local ID and many of the logical and physical identifiers. This search will open the Medical records for the animal/group.
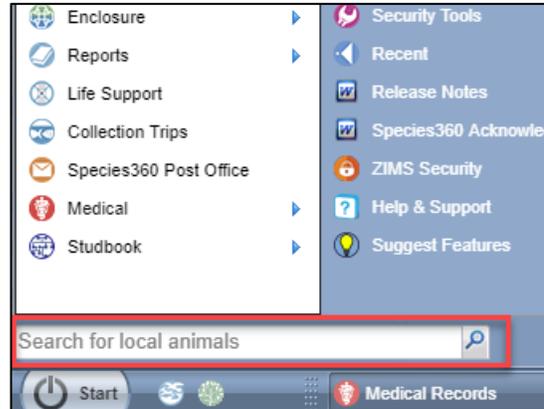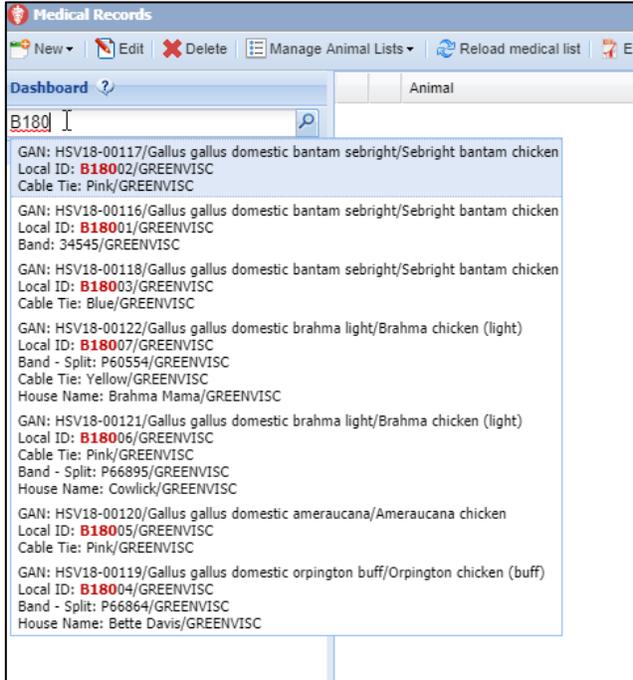
You can find animals using the Search for Local Animals box above the Start menu. You can search by the same identifiers as above. This Search will open the Husbandry record for the animal/group and you can navigate to the Medical Records by selecting the Medical Records tab. This tab only appears is you are in the Details tab of the Husbandry record.

You can also find animals using the Manage Animal Lists option. Select the desired list from the drop down.
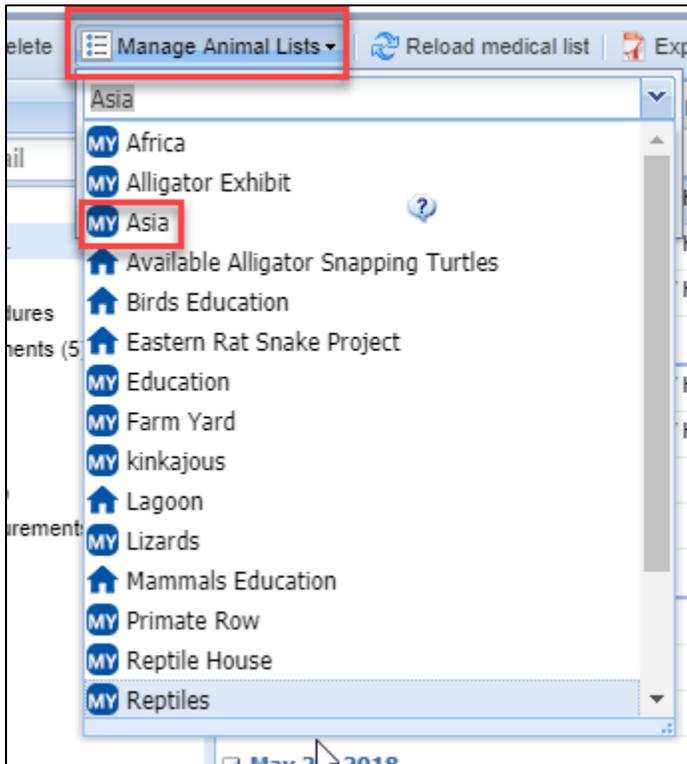
Then select the Animal GAN hyperlink into the record. This Search will also open the Husbandry record and you can open the Medical records by selecting the Medical Records tab.

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Type Ahead Lookups

Many fields in the Medical module allow you to type a few letters of a many worded phrase to search partial matching phrases. These are called Type Ahead Lookup fields. These fields are indicated by a lookup magnifying glass.
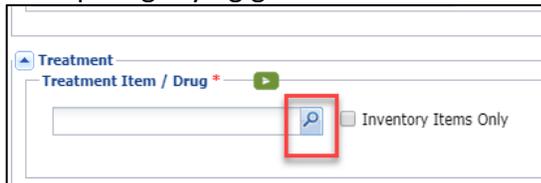
What you type into these fields will be validating your entry against a long list of possibilities, thus saving you data entry time by not requiring the entire word string to be typed. Type Ahead searches are especially helpful in the Test Dictionary, Taxonomy, Institution, Medical Terms and Medical Test fields where entries may be long and difficult to type correctly.

For example, we want to record the injectable drug Enrofloxacin in a 100 mg/ml solution. We start by typing "enro" and we see results for the top matches containing "enro".

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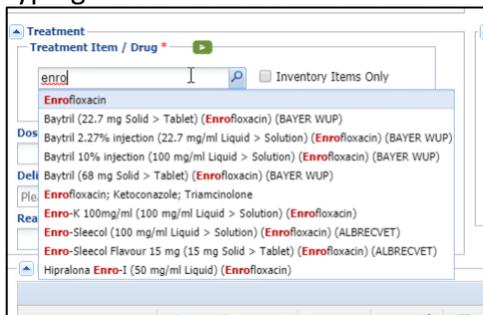
We then use a space and type in "100". The results displayed are much closer to what we want.
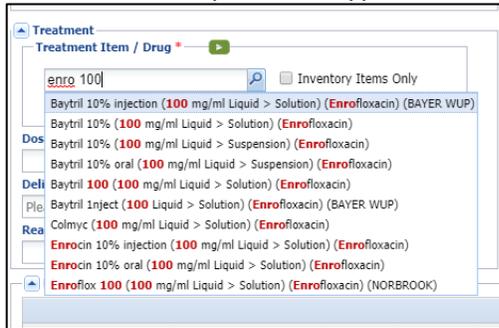
We then add a space and type "inj". The display is further limited to only injectable selections.
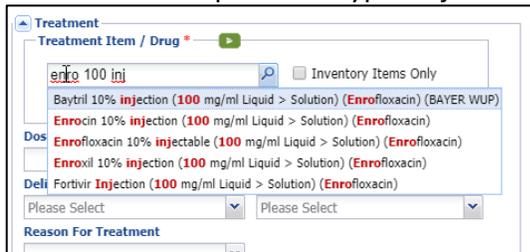
The order doesn't matter, you could type in "100 inj enro" and it would be found.

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Dashboard Animal Search

The Dashboard animal search is found in the upper left corner of the Medical module. All other searches are grey bars in the lower left corner of the Medical module. All module searches have a Simple and Advanced set of filters except for Physiological Measurements. Click on the bar to display the level of detail you need. In general, if a field is left blank the search will be open ended, meaning that all options for that field will be included in the search results. The more fields that you record information in the more filtered your search results will be and will produce fewer, more specific, results.

The Reset button will return all fields to their defaults. When performing multiple searches with different filters it is recommended to Reset the search to avoid possible retention of undesired filters.

The results of the search are displayed in the main Medical Dashboard. The Date column can be sorted in Ascending or Descending order; the default is the most recent record on the top. You can select to group the results by Animal, Date or Responsible Party by selecting the down arrow to the right of the column header. The columns can be re-ordered by dragging and dropping where you want them. The list can be exported by selecting Export Medical List at the top but know this can be a very lengthy export as all details for each record are included.

Use the type ahead lookup field at the top of the left-hand Dashboard to search for a Local animal. Possible matches will display as you type.
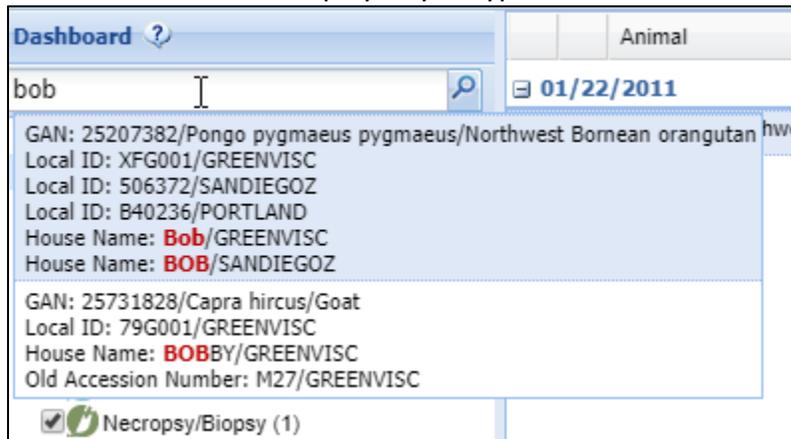
This field will find only records that are Local to your institution and when selected will open the Medical record.

You can search by:
GAN
Local ID – will find matches for your Local ID or Local IDs for other institutions if you hold/held the animal
Studbook Number
House Name
Tag, Band, Transponder and Tattoo
Taxonomy

You can filter your search by using the magnifying glass Look Up option. This search allows you to look for Global animals and this is one way to view Medical records shared with you by another institution. If you click the hyperlink, you can view the Husbandry record. If you highlight the animal, you need and click "select" it will open the Medical records. You can also highlight multiple animals and select them all to view in the Medical dashboard.
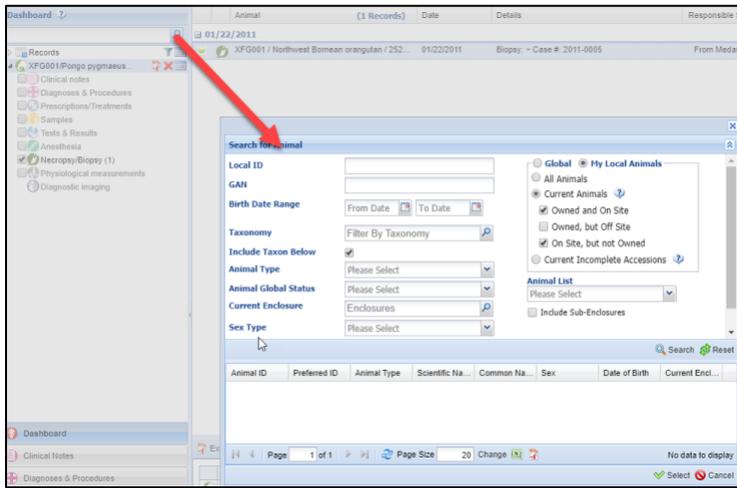
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Clinical Notes

Example Search:

If you need a comprehensive search of data that may be in notes and not entered in a standardized manner, this search can help retrieve clinical notes. You can also use structured text templates for things you want to find later. For example, a note template for all clinicians to enter TB test responses in the same way will allow you to retrieve those results quickly with this search. If you need to generate a case report list for a student, intern, or resident, you can use the Note Author field.

Clinical Notes Simple Search

Date Range – The search will return Notes recorded on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.

Animal – This looks for Local Animals. You can search by GAN, Local ID, House Name, Studbook Number, Taxonomy and most other common Identifiers. Only one Animal can be selected. Using the magnifying glass lookup feature you can filter your Search and even expand the Search to include Global records.

Note Author – Sourced from your Staff list, can search for Individuals, Teams or Departments. Check Include Obsolete Staff to include any Staff that have been marked as Obsolete; if not checked, only Active staff will be found.

Clinical Note Type – A single selection for specific Types of Notes. If searching for an Animal Care Staff Medical Summary Note you will need to search in the Husbandry module.

Search in Notes – Enter specific word(s) you want to search for. The order doesn't matter but, if more than one word is entered, they must all be found within the Note to produce a result. A single keyword will likely return the largest number of results. If your team uses standardized text, you can capture specific phrases and search for them using this filter (example: preshipment exam). You can

look for a partial text string by preceding it with an "*". For example, if you are looking for "hematemesis" you can type "*hemat".

Clinical Notes Advanced Search (additional filters)
Record Scope – The options are Local (animals you either hold or own, current and historically), Shared (those records currently being Shared with you by another institution) and All (both Local and Shared records).
Problem – To use this field you must have an Animal selected in the Animal field. If there are any current concerns or problems recorded for the Animal in focus, this field will populate with a dropdown for your selection. The search will find only Notes associated with the selected problem.
Taxonomy – Taxonomy can be recorded at any level. You can use Common or Scientific name. You do not have to type the entire name. For example, if you type "Nom con" ZIMS will find "Nomascus concolor". Include Taxon Below is checked by default.

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Diagnosis & Procedures
Example Search:
If you enter diagnosis in a standardized way, using the diagnosis & procedure search features will allow you to rapidly generate a case list or a count of cases for different medical concerns in your collection history. Additionally, it will feed into the search by diagnosis report, and global morbidity and mortality resource which lay the foundation for population health assessments. This is much more efficient then searching for diagnoses information buried in notes as plain text.

Diagnosis & Procedures Simple Search
Animal – This looks for Local Animals. You can search by GAN, Local ID, House Name, Studbook Number, Taxonomy and most other common Identifiers. Only one Animal can be selected. Using the magnifying glass lookup feature you can filter your Search and even expand the Search to include Global records.
Taxonomy – Taxonomy can be recorded at any level. You can use Common or Scientific name. You do not have to type the entire name. For example, if you type "Nom con" ZIMS will find "Nomascus concolor". Include Taxon Below is checked by default.
Medical Concern or Procedure – This is a Type Ahead Lookup and possible matches will display as you type. Or, you can use the look up option to filter the terms.
Show Only Active Medical Concern or Procedure – By default, Active and Inactive Medical Concerns or Procedures will be found. Check this box to search only for currently Active Concerns or Procedures.
Onset Date Range – The search will return Diagnosis and Procedures recorded on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.

Responsible Clinician – Sourced from your Staff list, can select only for Individuals, Teams or Departments are not available. Check Include Obsolete Staff to include any Staff that have been marked as Obsolete; if not checked, only Active staff will be found.

Diagnosis and Procedures Advanced Search (additional filters)
Record Scope – The options are Local (animals you either hold or own, current and historically), Shared (those records currently being Shared with you by another institution) and All (both Local and Shared records).
Clinical Diagnosis – Checked by default, this information sources from the Diagnosis & Procedures module.
Biopsy Diagnosis – Checked by default, this information sources from the Necropsy/Biopsy module.
Include Invalid Records – This information sources from any Diagnosis or Procedures that were marked as Invalid rather than deleting them.
Medical Concern or Procedure (second option) – This is an option to search for two Concerns or Procedures. Both fields are Type Ahead Lookups and possible matches will display as you type. Or, you can use the look up option to filter the terms. Both entries do not have to be found, just one or the other will produce results.
Resolution Date Range – The search will return Diagnosis and Procedures that were marked as Resolved on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.
Confidence Level – If a Confidence Level has been recorded you can filter the search by one of the three selections available.

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Prescriptions/Treatments
Example Search:
If you seek to find any historical antibiotic prescriptions given orally to primates in your collection, use the advanced Prescription/Treatment search for primates using the drug category "Anti-microbial" and delivery route "oral". If you want to answer the vet advisor's survey question about what vaccines have you given for a specific taxonomy, use the advanced Prescription/Treatment search for that taxonomy using the drug category "vaccine or antisera".

Prescriptions/Treatments Simple Search
Record Scope – Selections are Animal Rx, Enclosure Rx or All (this will return both Animal and Enclosure Prescriptions). If All is desired do not check Animal ID or Enclosure ID below.
Animal ID/Enclosure – What you check here will change the next field so you can record an Animal (only one) or an Enclosure. This looks for Local Animals. You can search by GAN, Local ID, House Name, Studbook Number, Taxonomy and most other common Identifiers. Only one Animal can be selected. Using the magnifying glass lookup feature you can filter your Search and even expand the

Search to include Global records. If you want to include more than one Enclosure you can accept the default to Include Enclosures Below so this depends on the set up of your Enclosure Tree.

Treatment Item/Drug – This field is a Type Ahead Lookup and matches will display as you type. You can type the first few letters of each word if the drug has multiple words such as typing "sod ole" to find "sodium olefin sulfonate". You can also use the magnifying glass lookup to help you find the Item/Drug.

Start Date – The search will return Prescriptions or Treatments that started on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.

Active Prescriptions as of today – By default all Prescriptions/Treatment that match the other filters will be returned. You need to check this box if you want only those that remain Active.

Taxonomy – Taxonomy can be recorded at any level. You can use Common or Scientific name. You do not have to type the entire name. For example, if you type "Nom con" ZIMS will find "Nomascus concolor". Include Taxon Below is checked by default.

Prescriptions/Treatments Advanced Search (additional filters)

Record Scope – In addition to Animal Rx/Enclosure Rx/All, the options for Local (animals you either hold or own, current and historically), Shared (those records currently being Shared with you by another institution) and All (both Local and Shared records) are available.

End Date – The search will return Prescriptions or Treatments that ended on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.

Drug Category – This is a single select cascading dropdown of drug categories. This can be very helpful if there are many variations of the Treatment Item/Drug and you don't know which one to select

Delivery Route – This is a single select drop down of the various delivery routes for Treatments.

Prescribed By – Sourced from your Staff list, can select only for Individuals, Teams or Departments are not available. Check Include Obsolete Staff to include any Staff that have been marked as Obsolete; if not checked, only Active staff will be found.

Adverse Effects – This is a single select drop down list of the five adverse effects that are available for selection.

Search in Notes/Comments – This will look for a word or words recorded in the Notes/Comments box. The order of the words does not matter, but if more than one is listed they must both be found somewhere in the same Note.

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Samples
Example Search:

If you want to see if you have submitted samples to the frozen zoo for a specific animal or taxonomy, do a simple search of your sample records for sample type "Tissue"to generate a relatively short list of possible samples that may have been submitted. If you entered a note about where a sample was sent, you may also use the "Search in comments/notes" section to filter your list.

Sample Simple Search

Animal ID – This looks for Local Animals. You can search by GAN, Local ID, House Name, Studbook Number, Taxonomy and most other common Identifiers. Only one Animal can be selected. Using the magnifying glass lookup feature you can filter your Search and even expand the Search to include Global records.

Taxonomy – Taxonomy can be recorded at any level. You can use Common or Scientific name. You do not have to type the entire name. For example, if you type "Nom con" ZIMS will find "Nomascus concolor". Include Taxon Below is checked by default.

Collection Date – The search will return Samples collected on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.

Sample Type – This is a single select drop down of the various Sample Types available.

Sample Advanced Search (additional fields)

Record Scope – There are two options for Scope you can select from and they are independent of each other. The first option is Local (animals you either hold or own, current and historically), Shared (those records currently being Shared with you by another institution) and All (both Local and Shared records). The second option is Antemortem, Postmortem or All (both Antemortem and Postmortem records).

Anatomical Source/Tissue – This is a Type Ahead lookup that will display possible matches. You can also use the magnifying glass lookup to help you find what you are looking for.

Collection Method – This is a single select drop down list of the various methods used to collect a Sample.

Collected By – You can select Staff or External Contact. If Staff is selected the options will source from your Staff list. You can select Individuals, Teams or Departments. If you select External Contact, they must be recorded as a Contact in ZIMS. You can use the magnifying glass lookup to help you find them. Check Include Obsolete Staff to include any Staff that have been marked as Obsolete; if not checked, only Active staff will be found.

Additive/Preservatives – This is a single select drop down list of the additives or preservations added to the Sample after collection.

Local Sample ID – This is a free text field to find Samples that you have given Local IDs to.

Reason – This is a single select cascading drop down for the reason that you collected the Sample.

Status – This is a single select drop down for the most recent status of the Sample.

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Tests & Results

Example Search;

If you are doing a risk assessment and need to generate a list of results for a specific test, you may use the Tests & Results search filter or the specified test result report. You may need to search multiple test methodologies to capture all the various tests that have been run in your collection history. If you are uncertain what methodologies have been used, you may consider an advanced search by test category to return all the Immunology/serology tests that have been done in a species. Then you can rapidly click through the results by maximizing the lower center panel and using the next and previous button.

At the top of the Tests & Results Search dashboard are two pre-defined searches. There are no filters applied to these searches and they are automatically run when selected.

Pending Tests – This selection will display any Tests that have been requested but results have not yet been recorded. It could be one test in the list that does not have results recorded. If you do not intend to record a result for that Test you should remove it from the list or it will continue to display in this search.

Results for Review – This selection will display any Tests where results have been recorded but have not yet been reviewed and marked as such. It could be one test in the list.

Tests & Results Simple Search

Animal ID - This looks for Local Animals. You can search by GAN, Local ID, House Name, Studbook Number, Taxonomy and most other common Identifiers. Only one Animal can be selected. Using the magnifying glass lookup feature you can filter your Search and even expand the Search to include Global records.

Taxonomy - Taxonomy can be recorded at any level. You can use Common or Scientific name. You do not have to type the entire name. For example, if you type "Nom con" ZIMS will find "Nomascus concolor". Include Taxon Below is checked by default.

Sample Type – This is a multiple select drop down of the various Sample Types available.

Laboratory – This single select drop down list sources from the Global and Local Institution List for institutions entered as Category = Other, Institution Type = Laboratory. If you do not find what you need in the list, you will need to add it as a Local Institution.

See Add Local Institution

Date Requested – The search will return Tests requested on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.

Search in Comments/Notes – This will look for a word or words recorded in the Notes/Comments box. The order of the words does not matter, but if more than one is listed they must both be found somewhere in the same Note.

Tests & Results Advanced Search (additional fields)

Record Scope – There are two options for Scope you can select from and they are independent of each other. The first option is Local (animals you either hold or own, current and historically), Shared (those records currently being Shared with you by another institution) and All (both Local and Shared records). The second option is Antemortem, Postmortem or All (both Antemortem and Postmortem records).

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Anesthesia
Example Search:
If you want to review anesthesia records for a specific taxonomy or based on a specific drug, you can use these searches. You may filter by those procedures with excellent and/or good outcomes, or review the poor outcomes. If a drug is not available, you can search for which protocols may need to be modified as a result. If you need to generate a case report list for a student, intern, or resident, you can use the Note Author field.

Anesthesia Simple Search
Animal – This looks for Local Animals. You can search by GAN, Local ID, House Name, Studbook Number, Taxonomy and most other common Identifiers. Only one Animal can be selected. Using the magnifying glass lookup feature you can filter your Search and even expand the Search to include Global records.
Anesthesia Start Date – The search will return Anesthesia started on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.
Overall Rating – This is a multiple select drop down list of the ratings available to select from.
Taxonomy – Taxonomy can be recorded at any level. You can use Common or Scientific name. You do not have to type the entire name. For example, if you type "Nom con" ZIMS will find "Nomascus concolor". Include Taxon Below is checked by default.
Drug Used – This field is a Type Ahead Lookup and matches will display as you type. You can type the first few letters of each word if the drug has multiple words such as typing "Zola hydro" to find "Zolazepam Hydrochloride". You can also use the magnifying glass lookup to help you find the Item/Drug.

Anesthesia Advanced Search (additional fields)
Record Scope – The options are Local (animals you either hold or own, current and historically), Shared (those records currently being Shared with you by another institution) and All (both Local and Shared records).
Complications – This is a multiple select drop down of the Complications options available.
Recovery – This is a multiple select drop down of the Recovery options available.
Health Status – This is a multiple select drop down of the Health Statuses available.

Search in Notes – This will look for a word or words recorded in the Notes/Comments box. The order of the words does not matter, but if more than one is listed they must both be found somewhere in the same Note.

Renarcotized – A single select option for Renarcotized, Not Renarcotized and All (includes both options. All is the default selection.

Responsible Clinician – A single select drop down sourced from your Staff list. You can select Individuals, Team or Departments. Check Include Obsolete Staff to include any Staff that have been marked as Obsolete; if not checked, only Active staff will be found.

Reason for Restraint – A single select cascading drop down of the Reasons for the Anesthesia.

Delivery Route – A single select cascading drop down of the Delivery Route for the Anesthesia.

Delivery Method – A single select drop down of the method used to deliver the Anesthesia.

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Physiological Measurements
Example Search:
If you are trying to recall what location provided the most reliable blood pressure measurement, or want to quickly review the heart rate and respiratory rate or the end tidal CO2 values for a species in prepare for a long surgery, this search will collate those results and you can maximize the lower center panel and click through them using the next and previous buttons.

Physiological Measurements Search
Record Scope – The options are Local (animals you either hold or own, current and historically), Shared (those records currently being Shared with you by another institution) and All (both Local and Shared records).

Animal ID – This looks for Local Animals. You can search by GAN, Local ID, House Name, Studbook Number, Taxonomy and most other common Identifiers. Only one Animal can be selected. Using the magnifying glass lookup feature you can filter your Search and even expand the Search to include Global records.

Taxonomy – Taxonomy can be recorded at any level. You can use Common or Scientific name. You do not have to type the entire name. For example, if you type "Nom con" ZIMS will find "Nomascus concolor". Include Taxon Below is checked by default.

Date Range – The search will return Measurements taken on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.

Measurement Type – A single select drop down of the Physiological Measurements available to record.

Restraint Method – A single select drop down of the three type of Restraint available.

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Necropsy/Biopsy

Example Search:

You may search for pathology cases in various states of completion, generate a case report list for a student, intern, or resident. Search for specific key words in the text or standardized diagnoses terms (example: mycobacteriosis) to generate a list of cases.

Necropsy/Biopsy Simple Search

Record Scope – There are two options for Scope you can select from and they are independent of each other. The first option is Local (animals you either hold or own, current and historically), Shared (those records currently being Shared with you by another institution) and All (both Local and Shared records). The second option is Necropsy, Biopsy or All (includes both Necropsy and Biopsy records).

Animal ID – This looks for Local Animals. You can search by GAN, Local ID, House Name, Studbook Number, Taxonomy and most other common Identifiers. Only one Animal can be selected. Using the magnifying glass lookup feature you can filter your Search and even expand the Search to include Global records.

Taxonomy – Taxonomy can be recorded at any level. You can use Common or Scientific name. You do not have to type the entire name. For example, if you type "Nom con" ZIMS will find "Nomascus concolor". Include Taxon Below is checked by default.

Necropsy/Biopsy Date – The search will return Necropsies or Biopsies performed on or between the dates selected. If one or the other is left empty, the results will be open ended. For example, if you record a From Date of 1 October 2018 and leave the To date blank, it will return results from 1 October 2018 through the current date.

Search by Status – Check the box to activate the slide bar to search by the Status. This is a good way to find any Necropsies or Biopsies that are not finalized.

Necropsy/Biopsy Advanced Search (additional fields)

Case Number – This is a free text field for records that you recorded a Case Number on.

Responsible Prosector – You can select Staff or External Contact. If Staff is selected the options will source from your Staff list. You can select only Individuals, Teams and Departments are not available. If you select External Contact, they must be recorded as a Contact in ZIMS. You can use the magnifying glass lookup to help you find them. Check Include Obsolete Staff to include any Staff that have been marked as Obsolete; if not checked, only Active staff will be found.

Histopathology Report By - You can select Staff or External Contact. If Staff is selected the options will source from your Staff list. You can select only Individuals, Teams and Departments are not available. If you select External Contact, they must be recorded as a Contact in ZIMS. You can use the magnifying glass lookup to help you find them. Check Include Obsolete Staff to include any Staff that have been marked as Obsolete; if not checked, only Active staff will be found.

Responsible Pathologist – You can select Staff or External Contact. If Staff is selected the options will source from your Staff list. You can select only Individuals, Teams and Departments are not available. If you select External Contact, they must be recorded as a Contact in ZIMS. You can use the magnifying glass lookup to help you find them. Check Include Obsolete Staff to include any Staff that have been marked as Obsolete; if not checked, only Active staff will be found.

Diagnosis Term – A type ahead lookup that will display possible matches as you type. You can type the first few letters of a diagnosis and matches will be displayed. For example, you can type "for lam" to find "forelimb lameness". You can also use the magnifying glass look up to help you find the Term.

Word Phrase in Reports – This will look for a word or words recorded in the Final Summary box in the Finalize tab. The order of the words does not matter, but if more than one is listed they must both be found somewhere in the same Note. It is not a contains search.

External Laboratory – This single select drop down list sources from the Global and Local Institution List for institutions entered as Category = Other, Institution Type = Laboratory. If you do not find what you need in the list, you will need to add it as a Local Institution. See Add Local Institution

Only Records with Images – Only records with images attached will be displayed.

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