

rhapsody



Hi,

Congrats on your new practice management software!
We're so excited you're coming on board.

To give you the best experience from the get-go, we put together this packet filled with lots of useful information and tools like checklists and timelines. This is your guide to the entire onboarding process, so keep it on hand as we prepare you to go live. And don't forget, we're here to help, so please reach out any time.

Welcome to the rhapsody family!

-Kristina



IN THIS PACKET

[Meet the team](#)

[Prepare to onboard](#)

[Onboarding](#)

[Go live! prep](#)

[Post launch](#)

Meet the team

Onboarding Team — assemble! We're your partners through this entire process, so our number one priority is to help you feel excited and unburdened in the days leading up to your *Go Live!* date.



Kim Fish, VP of Veterinary Product

Kim brings her wealth of veterinary consulting experience right to your doorstep. She observes your flows and converts them to fit rhapsody. Ultimately, she helps set up the platform to maximize your efforts and give you more time at the end of the day.



Katie Schafer, Migration Manager

Katie S. helps obtain your current data and works hands-on with your team to get you up to speed before your *Go Live!* date.



Ashley Perez, Account Manager

Ashley is the face on the other end of the built-in platform chat. She helps you find your way if you get stuck.



Kristina Guldbrand, Operations Manager

Kristina helps coordinate things behind the scenes to keep your onboarding process on track and to ensure your platform is fully functioning from day one.



Katie Huneke, VP of Sales

Katie H. is likely the first person to greet you at rhapsody's doors. She walks you through the entire platform and prepares you to make the switch.



Sal Elaameir, VP of Finance

Sal handles the financials. He sends you important paperwork like the Service Agreement.

Prepare to onboard

Provide your team's contact details

We want to make sure your entire team gets the training and guidance they need, so by your *Go Live!* Date, your practice is one well-oiled machine. Use this template as a starting point to provide us with contact details for every team member.

Team member #1

Name:

Position:

Email:

Phone number:

Team member #2

Name:

Position:

Email:

Phone number:



TIME- SAVING TIP

Copy and paste the template to the left. Fill in the details for every team member. And send it to our migration manager Katie at katie.schafer@petabyte.technology

Set up Rhapsody Pay

What is Rhapsody Pay?

Rhapsody's cost is incorporated into our merchant service, Rhapsody Pay. Instead of paying a monthly service fee, just pay a flat rate fee for every card transaction

2.69% (credit card) | 1.79% (check card) | 1.39% (debit card)

Rhapsody Pay also comes with two optional modifications to make processing payments easier for you.

Rhapsody Pass

Add a service fee to every client card transaction to recoup the price of card processing. You keep 70 percent of the incremental fee revenue, so you spend less.

Choose the service fee:

- 4% (total service fee)
- 2% (partial service fee)
- 0% (no service fee)

Rhapsody Go

Store client's credit card information in our PCI-certified vault and enable card-not-present transactions in person or over the phone. Clients just sign invoices and go without swiping, inserting, or tapping.

Checklist | Rhapsody Pay documents

Want to make your Rhapsody Pay registration quick and painless? Prepare these documents before onboarding.

- ☐ For individual practices: practice owner's Social Security Number
For groups: group owner's Social Security Number
- ☐ IRS EIN Number (Tax ID)
- ☐ Driver's license (in some cases)
- ☐ Business registration documents (in some cases)
- ☐ Business License issued by the state (in some cases)

Time to Onboard


Ready to go? We're working hard behind the scenes to migrate your data, set up the platform, and train your team. But for a completely seamless and speedy experience, we need your help.

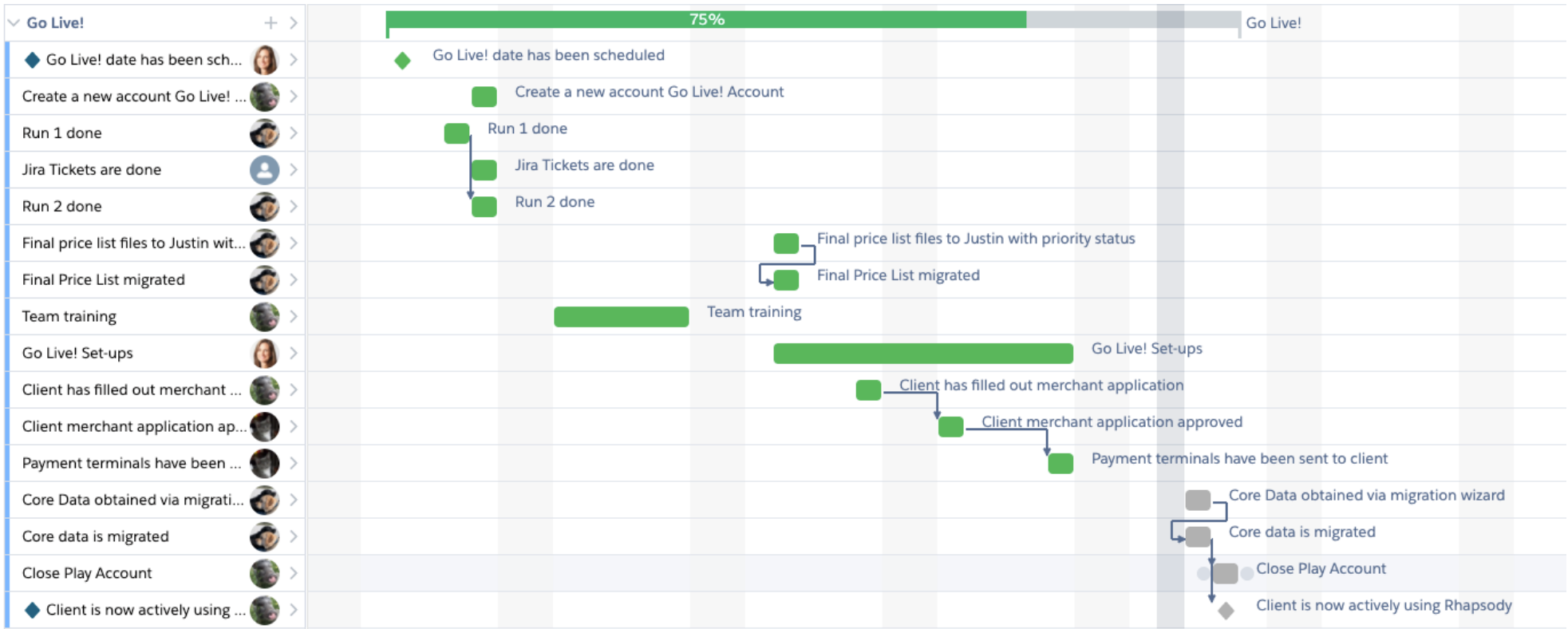
Your onboarding plan is tailored to fit your needs and outlined in detail to guide you.

- Reference Your Onboarding Timeline & Your Onboarding Checklist
- Distribute these documents to your entire team
- **Follow instructions and keep to the specified deadlines**

Your Onboarding Timeline

This is a bird’s-eye overview of your onboarding process. Many of these steps are dependent on each other, so sticking to the schedule is vital.

 [PRINT THIS PAGE](#)



Your Onboarding Checklist

Here we get into the nitty gritty details. This checklist outlines every step of the onboarding process to help track your progress as you hit every milestone.

[Go to your checklist](#)

Get ready to *Go live!*

To-do | Pre-launch prep

Practice prep

- Make sure setup for the label printer is complete on every rhapsody device.
- Join the Google Hangouts support call (set up in advance), so we're able to stay on with you all day and help through any first-day hiccups. Find quiet areas to chat when you need help. Otherwise, keep the call on mute.

Team prep

- Come prepared with your rhapsody log-in details
- Practice logging in, clocking in, and clocking out
- Make sure the team is up to speed on essential flows
 - Process payments through Rhapsody Pay
 - Enter client-provided medical history to a patient's record
 - Enter lab orders through a SOAP

Go Live! Tips

Some articles might require a login. Use your rhapsody credentials.

General

- The tablet view is slightly different from the desktop and might require some additional scrolling
- Do not open rhapsody in multiple browser tabs to prevent creating multiple SOAPs for the same patient.

Set up

- Every team member is assigned a role(s) that provide varying access to areas of the platform. If a function appears restricted, it may be due to the permission settings. [GO→](#)
- If a patient or client doesn't appear in search, they might be inactive. Go to the **All** tab to activate.


Appointments

- To remove the **Exam—migrated** label from migrated appointments, you need to assign an appointment type to each entry. [GO →](#)
- Opening an appointment creates a SOAP. Once a SOAP is created, that appointment *cannot* be deleted. To cancel the appointment, drag it to the **Cancelled/No show** column in the Scheduler.
- View boarding appointments in the Scheduler by selecting the **Boarding** tab. [GO→](#)

Medicine

- Go to the **Lab tests** tab to find migrated labs. To view, assign to a patient. [GO→](#)
- When writing prescriptions
 - For in-house administration, select **Order**
 - For scripting in and out, select **Prescribe**
 - Make further edits after selecting **Print**

Client-facing tasks

- Completed reminders must be manually resolved. Select  to remove temporarily.
- To send a payment to the Rhapsody Pay terminal: open the patient's invoice > Record payment > Send to terminal

More questions?

Check our extensive library of video tutorials, articles, and FAQs [GO→](#)

Post-launch

Welcome to rhapsody! We worked hard to prepare you, but we know this transition is an ongoing process. This is a partnership and we're committed to making your everyday a success. Here's the lowdown on how to send up the bat-signal, should you need it.

Types of service requests

| | |
|------------------------------------|--|
| I need help | <p>As you adjust, your team is bound to hit a few snags. We're here to guide you until you're a pro.</p> <ul style="list-style-type: none">• Use our live chat function to talk directly with our support staff. Make sure to provide enough details so the help is more thorough. |
| I found a bug | <p>The platform is always evolving to accommodate your needs. If you run into a bug, let us know and we will make every effort to resolve the issue ASAP.</p> <ul style="list-style-type: none">• Let your account manager know the issue in detail• Provide screenshots if possible• If you see the Confused Doggo in the bottom right of your screen, that means there's a bug on our end. If spotted, message us with detailed information and screenshots if possible. The sooner we know, the sooner our developers start fixing the issue. |
| I want to request a feature | <p>We know there will be some features you might want to see in rhapsody that are not yet available. We're happy to hear any requests, but keep in mind that we cannot always commit to a time frame for every request.</p> <ul style="list-style-type: none">• Let your account manager know your request and how critical it is to your daily flow• We will file the request, and if there are no internal factors, we will add it to our roadmap.• We will let you know as soon as the feature is released. |

Make a service request

| | |
|----------------------------------|--|
| Live chat | <p>This should be your go-to method for addressing any immediate issues. Select Chat with support from the left menu in rhapsody.</p> |
| Email us | <p>For less immediate requests, email us at support@rhapsody.vet</p> |
| Call your account manager | <p>If you're really in a bind, call your account manager directly.</p> |

How it works

| | |
|------------------------|--|
| Place a request | <ul style="list-style-type: none"> • Provide detailed information regarding service requests • Make every effort to remain available as we resolve the issue • Be patient! We're juggling many service requests at once and doing our best to help you ASAP |
| On our end | <ul style="list-style-type: none"> • Someone on our customer success team will receive the service request and try to resolve the request immediately • If it is not resolved on the call, your service request will be assigned a priority level • Requests will be handled according to the assigned priority level |

Our promise

- Strive to provide full customer satisfaction
- Respond to support requests within the specified time frames
- Interact with all staff respectfully
- Work continuously to improve quality of service
- Request and listen to feedback on how to improve
- Regularly review and monitor established performance indicators

Chat hours of operation

Monday-Friday 8:00 am to 8:00 pm EST

Weekends 10:00 am to 2:00 pm EST

Resources

We built an extensive library of self-help resources to help you along the way as well.

| | |
|--|---|
| Rhapsody University GO → | <p>This is your best resource to becoming a rhapsody pro. Rhapsody University is filled with video tutorials, articles, and FAQs.</p> <p><u>Please note: you need your rhapsody credential to access the full library</u></p> |
| Rhapsody Bites GO → | <p>Browse our blog for articles on new features and best practices for improving practice performance and team wellbeing.</p> |
| Newsletter Request subscription → | <p>We send rhapsody users two emails a month to keep you in the loop with the latest updates and platform tips .</p> |

Live chat

Don't forget to use the live chat for immediate requests.
Select **Chat with support** from the left menu in rhapsody.