

User Guide – New Rapport UX 2024

Contents

- Introduction.....2
- Home2
 - Status2
 - Menu3
 - KPI Summaries.....4
 - Weekly Summary4
 - Acquired Value.....4
 - Monthly Totals4
 - Communications by Media.....4
 - Communications by Type4
 - General Results5
- Schedule6
- Requests7
 - Open Requests7
 - Open Requests List.....7
 - Open Request Detail.....9
 - Summary Report9
- Clients.....10
 - Client Search10
 - Client Details11
 - Patients.....11
 - Preferences.....12
 - Preferences by Activity.....12
 - Communication Log.....13
 - Appointments13
 - Instant Virtual Visits.....14
- Messages15
- Reports.....16
 - Payment History Report16

Introduction

Rapport was due for a facelift! We've listened to feedback from all of our users and are excited to bring you an update to Rapport that offers a simple to use interface as well as some great new features that will work together to make communicating with your customers easier and more efficient.

The initial Rapport upgrade focuses on all of the daily use functions in your application. It features a modernized User Interface (UI), a homepage that displays Key Performance Indicators (KPIs), an easier to navigate Clients section, improved 2-way MMS Messages Center and more. More upgrades are on the way! Rapport functions that have not yet been upgraded can still be found through the Rapport Legacy App, which is always accessible from the bottom left of the UI. This guide reviews the new features and instructions on where to find important functions and complete daily workflows.

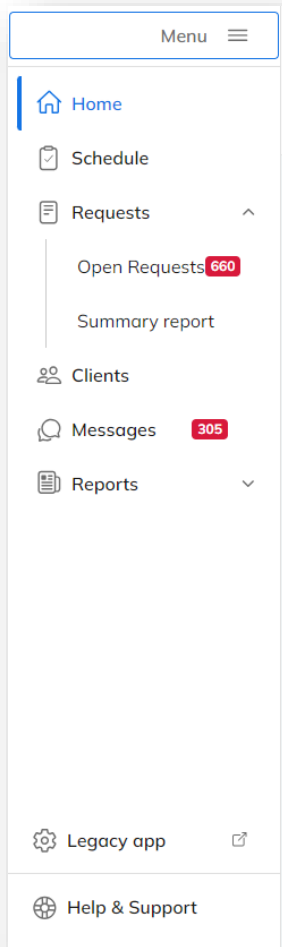
Home

Status

Hover over the ⓘ to view the exact date and time that Rapport last fully synced with your Practice Management software.

- **Connected** - last sync within the past 24 hours
- **Connected** - last sync within 24-72 hours (data is 1-3 days old)
- **Disconnected** - last sync more than 72 hours (3 days) ago. Automated messages are suspended when connection status is red, to prevent out-of-date messages from being sent to pet owners

Menu

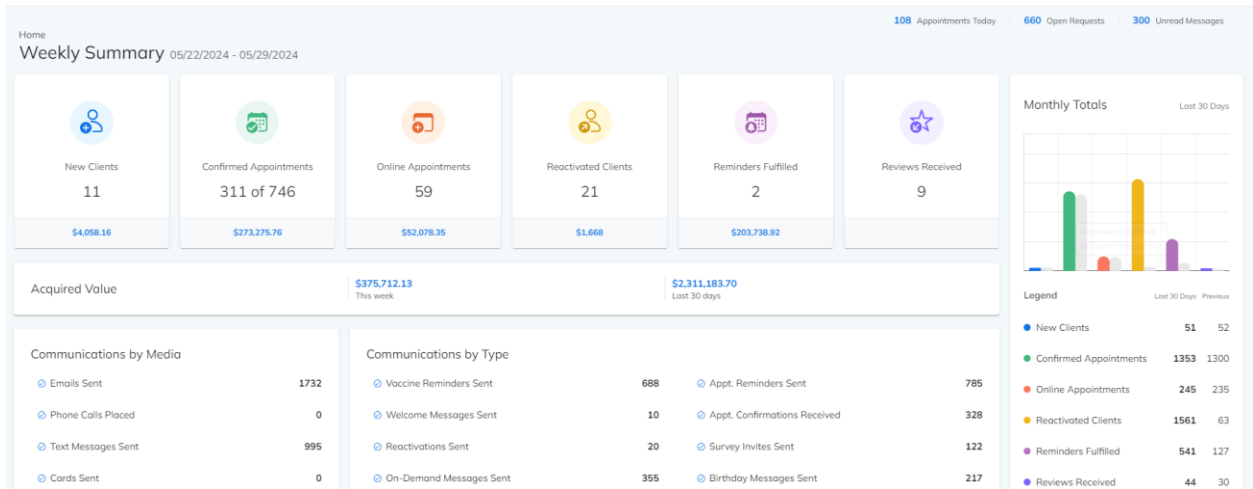


Use the Menu to navigate through Rapport. Menu options are as follows:

- **Home** – Return to the main landing page which shows Weekly Summary and other Key Performance Indicators
- **Schedule** – View booked appointments for past, current or future dates
- **Requests** – Manage requests submitted by pet owners from Pet Portal, including client or pet profile updates, certificate requests and more. Badge indicates unread requests
- **Clients** – Search clients to access patient information, update contact preferences, manage pet portal access, review communication history, access past and future appointments, or start a virtual (telemedicine) visit
- **Messages** – Easily access all active SMS message threads with full message history. Badge indicates new unread messages
- **Reports** – Access to the Payment History report, which reflects deposits placed through the online booking workflow

- **Legacy App** – Return to Legacy Rapport to access areas not yet updated: Reviews, Media Center, Desktop Assistant Download, Setup, and all other Reports
- **Help & Support** – Find Rapport Support contact info as well as user guides and videos

KPI Summaries



Weekly Summary

Weekly summary always reflects an account of the previous 7 days (end date is always today). Tiles will only appear if activity/service has active data to report. Tiles may include:

- **New Clients:** Number of new clients added to PIMS within the past 7 days
- **Confirmed Appointments:** Number of appointments in the past 7 days confirmed by Rapport
- **Online Appointments:** Number of appointments in the past 7 days booked online
- **Reactivated clients:** Number of clients that received a reactivation email in the past 7 days and booked an appointment
- **Reminders Fulfilled:** Any reminders included on an automated reminder message in the past 7 days that were fulfilled
- **Reviews Received:** Any reviews received in the past 7 days

Acquired Value

Demonstrates income generated in the connected Practice Management Software, by week and over the last 30 days. (updated daily)

Monthly Totals

Summarizes the same key client engagement stats as the week summary, but instead shows the past 30 days compared to 30 days prior to that (essentially, this month vs last month, rolling)

Communications by Media

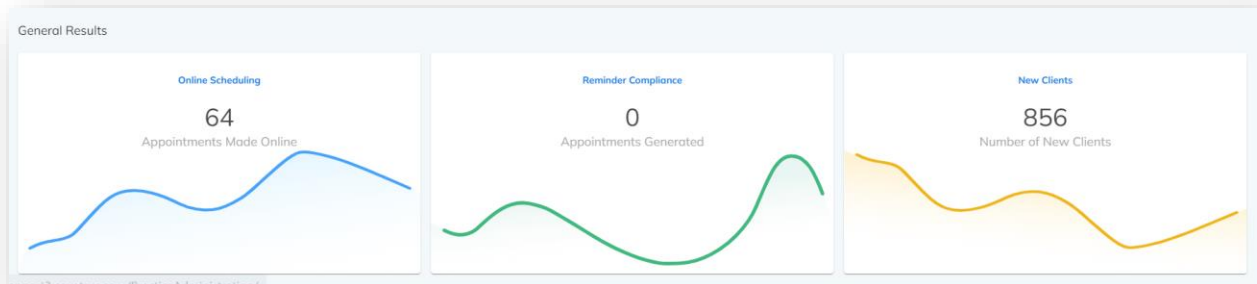
Weekly activity based on channel: emails, phone calls, text messages and postcards

Communications by Type

Weekly activity based on communication type: vaccine reminders, appointment reminders, welcome messages, appointment confirmations, patient reactivations, surveys, on demand messages, and birthday messages

General Results

Shows the lifetime value of Rapport in the key areas of appointments made online, appointments generated as a result of a reminder, and new clients acquired. Click each tile to see additional details.



Online Scheduling

- Number of appointments booked online by month
- Percent of appointments booked online by appointment type/reason
- Online appointments booked by source (web vs app)

Reminder Compliance

- Number of appointments generated following a healthcare reminder being sent
- Acquired annual revenue generated (incrementing monthly) set against the number of appointments each month that occurred as a result of a reminder being sent

New Clients

- Total number of new clients added each month, set against the total annual new clients (incrementing monthly)
- Number of new clients added each month via online booking, set against the total annual new clients (incrementing monthly) added via online booking. A practice may elect not to allow new clients to book online – if this is the case, this graph will be empty.

Schedule

Schedule

05/29/2024

Total Appointments 108

Total Confirmed 59

Total Unconfirmed 49

Time	Client	Patient	Species	Gender	Breed	Status	Resource	Provider	Visit Reason
12:00 AM	Gillian Crane	Sprocket	CANINE	♂	MIXED BREED	Confirmed	Dr. Soverns	Soverns	Drop Off/ACTH
8:00 AM	Kara Getz	Cheddar	FELINE	♂	DOMESTIC SHORTHAIR	Confirmed	Dental	-	Dental/Dental cleaning
8:00 AM	Julia Gill	Holly*	CANINE	♀	CAVAPOO	Confirmed	Dr. J. Thumel Surgery (No Or...	-	Surgical:OVH BW from April...
8:10 AM	Tara Clary	Lily*	CANINE	♀	SCHNAUZER MIX	Confirmed	Day Camp/ Boarding/ Bath	-	Brd- DAYCAMP:UNLIMITED ...
8:30 AM	Keicie Longaker	Bandit	CANINE	♂	JACK RUSSELL TERRIER	Unconfirmed	Dr. Breakell	Breakell	Euthanasia:ANY DOCTOR? ...
8:30 AM	Royel White	Bentley	CANINE	♂	BICHONPOODLE MIX	Confirmed	Dr. Breakell	-	Wellness/Vaccines:TTO NOT...

1. Click the arrows to move from day to day, click the date to type in a specific date, or click the calendar icon to open the date picker
2. Click to display all appointments for the day selected. This page will default to 25 rows per page, but can be adjusted from 10 to 100 rows per page (use the rows per page and page advance at the bottom right)
3. Click to display only the confirmed appointments for the day
4. Click to display only the unconfirmed appointments for the day
5. Click to search for a specific client or patient name
6. Click to filter the list by either resources or providers. If filters are active, a red dot will appear on the filter icon
7. Click to send an on-demand message by email, text and/or phone. There are 26 message templates to choose from, or a message can be constructed from scratch

12:00 AM	Gillian Crane	Sprocket	CANINE	♂	MIXED BREED	Confirmed	Dr. Soverns	Soverns	Drop Off/ACTH	
9:30 AM	Rob Nelson	Doctor Frankie	CANINE	♂	CHI-HUAHUA MIX	Unconfirmed	Dr. Soverns	Soverns	Sick/check foot, limping, v	Send Message

Send Message ✕

Contact by

Email Text Phone

Select phone

(443) 562-2162

Image Attachments

Drag and Drop or Browse Files

Select template

Message

Send

Send Message ✕

Contact by

Email Text Phone

Email address

jllhoshu@gmail.com

Email subject

A message from: Countryside Veterinary Clinic

Image Attachments

Drag and Drop or Browse Files

Select template

Prescription Pick Up

Message

Hello Gillian, the prescription for Sprocket is ready for pickup.

Send

Send Message ✕

Contact by

Email Text Phone

Select phone

(443) 562-2162

Select template

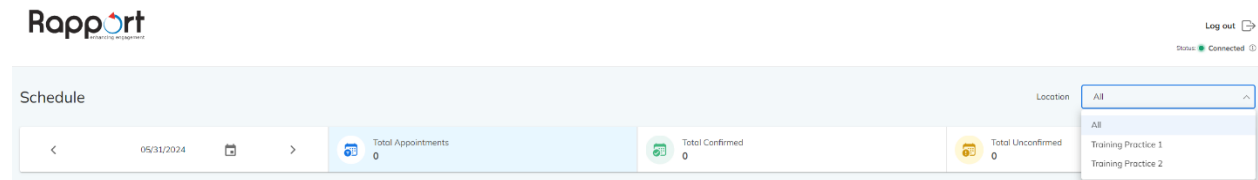
Surgery Went Well

Message

Surgery went well with Sprocket. he will be ready for pickup this afternoon. |

Send

In multi-site accounts, there is also an option to filter the schedule by location. Simply click the location drop-down at the top right of the page, as shown.



Requests

Open Requests

Requests can be sent by pet owners via the Pet Portal or the MyPetsWellness App. These requests fall into 9 categories:

- **Appointment** – For practices using the “Appointment Request” model rather than integrated online booking, pet owners will request a date and approximate time of appointment, which the practice must then review, book, and verify manually.
- **Appointment Confirmation** – Available only for practices that are *not* configured for online scheduling. Displays when the pet owner has confirmed their appointment. Practices using integrated online booking will see appointment confirmations in the schedule and in the Practice Management software – they do not show here as open requests.
- **Appointment Cancellation** – If the practice has allowed cancellation in their online booking configuration, this notice will appear if the pet owner cancels an existing appointment.
- **Boarding** – When enabled by the practice, a pet owner may request a boarding booking
- **Certificate** – The pet owner has requested a copy of the pet’s vaccination certificate
- **Grooming** – When enabled by the practice, a pet owner may request a grooming appointment
- **Prescription Refill** – When enabled by the practice, a pet owner may request a prescription refill of medication previously prescribed and dispensed in-clinic
- **Client Profile Update** – The client has supplied a change to their name or contact details
- **Pet Profile Update** – The pet owner has provided a change to their pet details

Open Requests List

The count of open requests will increment in the menu badge as well as at the top of this page, which shows **only** open requests. Requests can be cleared from this page and archived to the summary report by marking them as completed.

The screenshot shows the 'Requests' page with a table of open requests. The table has columns for 'Select all', 'Date received', 'Client', 'Patient', 'Gender', 'Breed', and 'Request Type'. A context menu is open over the first row, showing options: 'Save as complete', 'Print', and 'Reply'. The interface includes a 'Save Selected Requests as Completed' button at the top right and a 'Display by type' dropdown menu.

1. Click the check box to mark one or more requests as completed, then click Save Selected Requests as Completed to finalize
2. Use the drop-down menu to filter the list of open requests by request type
3. Click the column headers to filter the list of open requests in ascending or descending order
4. Click the > arrow to display the detail of the request
5. Click for additional options: Save the individual request as complete, print the request, or reply to the request
6. You can reply by email, text and/or phone. There are 26 message templates to choose from, or a message can be constructed from scratch

The three screenshots show the 'Send Message' dialog box with different configurations:

- The first screenshot shows 'Text' selected as the contact method, with a phone number '(443) 562-2162' and a 'Send' button.
- The second screenshot shows 'Email' selected, with the email address 'jilhonsu@gmail.com' and a 'Send' button.
- The third screenshot shows 'Phone' selected, with the same phone number, a template 'Surgery Went Well' selected, and a 'Send' button.

In multi-site accounts, there is also an option to filter the open requests by location. Simply click the location drop-down at the top right of the page, as shown.

The screenshot shows the 'Requests' page with a 'Location' dropdown menu open. The dropdown menu lists 'All', 'Training Practice 1', and 'Training Practice 2'. The interface also includes a 'Log out' button and a 'Status: Connected' indicator.

Open Request Detail

Request detail page will vary based on the nature of the request. In the case of a client or patient profile update, the current information in the Practice Management software will be displayed, alongside the new information submitted by the pet owner. For all request types, changes can be made manually in the Practice Management software at the discretion of the practice.

The screenshot shows a request detail page for a 'Pet Profile Update'. The page is divided into four main sections: Information in Software, New Information, Details, and History. The 'Information in Software' section shows client details for Elena Ott #827054, including patient name (Stella), species (CANINE), breed (CHIHUAHUA MIX), gender (FS), color (Cream), weight (8.5 lb), birthday (08/13/2016), and status (Active). The 'New Information' section shows patient name (Stella), species (CANINE), breed (CORGI), gender (F), color (.), weight (.), birthday (.), and status (.). The 'Details' section shows the location: 4886 Montgomery Rd, Ellicott City, MD 410, 461-2400. The 'History' section shows the request was received on Aug 13, 2023 (9:42:53 AM). At the bottom right, there are buttons for 'Reply', 'Print', and 'Save as complete'.

Summary Report

The summary report shows both open and completed requests. However, requests cannot be completed from the summary report – this must be done from the Open Requests page.

The screenshot shows the Summary Report page. At the top, there is a 'Summary Report' header with a 'Print' button (1) and a 'Display by type' dropdown menu (2) set to 'All'. Below the header, there are filters for 'Request received' (3) and 'Request Completed' (3). The 'Request received' filter shows 'From date' as 04/01/2024 and 'To date' as 05/01/2024. The 'Request Completed' filter shows 'From date' and 'To date' as mmmidd/yyyy. The main table (4) has columns for Date received, Client, Patient, Gender, Breed, Status, Request Type, and Date completed. The table contains several rows of data, including requests for Tim Hanks, Casper, Sugako Kawoi-Cozart, Chris Sontag, Jessica James, and Pak Seto. A 'Print' button (7) is visible next to the second row. At the bottom right, there is a 'Rows per page' dropdown set to 25 and a page indicator '1-25 of 58'.

1. A list of the requests can be sent to a local or network printer. A maximum of 500 requests can be printed at one time; if over 500 requests are shown, the print button will be disabled. Use filters to limit records displayed
2. Use the drop-down to choose only one request type to display
3. Filter the list by one of the following criteria:
 - a. Date the request was received (sent by pet owner)
 - b. Date the request was completed by practice staff
 - c. Rapport user that completed the request (which user was logged in when the request was marked complete)
 - d. Client details: name, ID, email, or phone number
4. Sort any column in ascending or descending order

5. Click the > arrow to display the details of the request
6. Determine whether the request is open or completed
7. Print or reply to the request (see previous section for details)

Clients

Client Search

To find details about a client or patient, begin with the client search.

1. Choose to search through all clients, or active clients only
2. Search by client first or last name. As you search, possible exact matches will appear below the search box, and all possible matches will populate dynamically in the record list
3. Click on the client name to access the full client record
4. Click for more options, to jump directly to either the general, preferences, communication log or appointments for that client

In multi-site accounts, there is also an option to filter the client search by location. This will limit the search to only clients whose set home location matches the selection. Simply click the location drop-down at the top right of the page, as shown.

Client Details

John Smith
(703) 867-5309 | 123@gmail.com
1234 Utopia Blvd, Townsville, IN 36912

Online Scheduling

- One Time Access Code Generate
- Online Scheduling Available Toggle
- Portal Access Available Toggle
- Portal Direct Access Portal Access
- Send Password Reset Send

General client details include the client’s name, phone number, email address, and physical address. Click the phone icon to send a text message to the client or click the email address to send an email message.

The client’s Pet Portal settings can also be set from this section, including:

1. One Time Access Code – click generate to create an access code for the client to log into the MyPetsWellness app
2. Allow or prohibit online scheduling for this client (where online scheduling is enabled overall)
3. Allow or prohibit Pet Portal access for this client
4. Directly connect to this client’s Pet Portal, in order to see exactly what they see in their portal
5. Send Password Reset – click to send a reset email if the client no longer can access their Pet Portal

Click the ▼ arrow to expand any of the sections below the general details. Click the ▲ arrow to close any section.

Patients

	Name	Species	Breed	Color	Age	Weight	Gender	Status	View
⊕	Captain	Canine	MIX	black	12y 4m	0.31 lb	♂	Active	⋮
⊕	Pal	Canine	Lab		1y 8m	0.00 lb	♂	Active	⋮

Preferences

Preferences by Activity

- Appointments
- Prescriptions
- Reminders
- Treatments
- Attachments

Expand the patients section to view the patients belonging to a client, shown in alphabetical order. Basic details are displayed, including patient status. To view additional information, click on the arrow at the far left, or choose from the view menu to jump to specific information such as appointments, prescriptions, reminders, treatments, or attachments. A patient details window will appear with tabbed headings for each of these details – active tab will be shown in blue.

Captain Active
 Canine | M | 12y 4m | 0.31 lb
 MIX

Appointments Prescriptions **Reminders** Treatments Attachments

Date	Type	Description	Due date
05/24/2026	3	Rabies 3 Year	05/24/2026
06/29/2024	3	Distemper Parvo (DHPP) (yearly)	06/29/2024
05/23/2024	3	Rabies 1 year	05/23/2024
05/23/2024	3	Rabies 1 year	05/23/2024
07/29/2023	Exam	'General' Reminder	07/29/2023
07/29/2023	4	'Recheck' reminder	07/29/2023

Preferences

Preferences reflect the preferred email, SMS and voice numbers to contact the client. For automated communications from Rapport, the client can provide a different email address or phone number through the pet portal, or the practice can enter it here for them. This does not override any Practice Management software data.

Preferences

Email

In Your Practice Software
 Email kruppenheimer@yahoo.com

Preferred Email

Text Messages

In Your Practice Software
 Preferred Phone (310) 702-6281

Voice Calls

In Your Practice Software
 Cell (310) 702-6281

Preferred Voice Number

Please, enter 10 or more digits

Preferences by Activity

These preferences further refine how Rapport contacts a client for specific types of emails. What's shown here should mirror what the client has elected in their Pet Portal; alternately, practice staff can modify it for them here. All channels are shown for all activity types, however this is first managed by what messages the practice chooses to send as a rule. For example, a client may elect to receive postcard pet reminders, but if the practice does not send postcards at all, then the client will still not receive postcards.

Preferences by Activity

	Appointment Reminders	Pet Reminders	Practice messages	Marketing
Email	<input checked="" type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept
Text	<input checked="" type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept
Phone	<input checked="" type="checkbox"/> Accept	<input type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept	<input type="checkbox"/> Accept
Postcard	<input checked="" type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept	<input checked="" type="checkbox"/> Accept

Apply

Communication Log

The communication log is sorted in chronological order (most recent message first). A green arrow indicates a message from the practice to the client; a red arrow indicates a message from the client to the practice. Click the message envelope to view the contents of the message.

Communications Log

Id	Date	Event	Media	To/From	Status	Msg.
2317	5/28/2024 4:55 PM	Client Message	SMS	(310) 555-1234	✓ received	
2316	5/28/2024 10:54 AM	Email Opened	@	petowner@gmail.com	✓ received	
2315	5/28/2024 10:54 AM	Email Opened	@	petowner@gmail.com	✓ received	
2314	5/28/2024 10:48 AM	Office Message	SMS	(310) 555-1234	✓ sent	
2313	5/28/2024 10:16 AM	Payment Confirmation	@		✓ sent	
2312	5/28/2024 10:16 AM	Appointment Request Confirmed	@	petowner@gmail.com	✓ sent	
2311	5/28/2024 10:16 AM	Appointment Request Received	@	petowner@gmail.com	✓ sent	
2310	5/28/2024 10:16 AM	Appointment Request Received	SMS	(310) 555-1234	✓ sent	
2305	5/23/2024 5:11 PM	Client Message	SMS	(310) 555-1234	✓ received	
2300	5/21/2024 2:38 PM	Office Message	SMS	(310) 555-1234	✓ sent	

Appointments

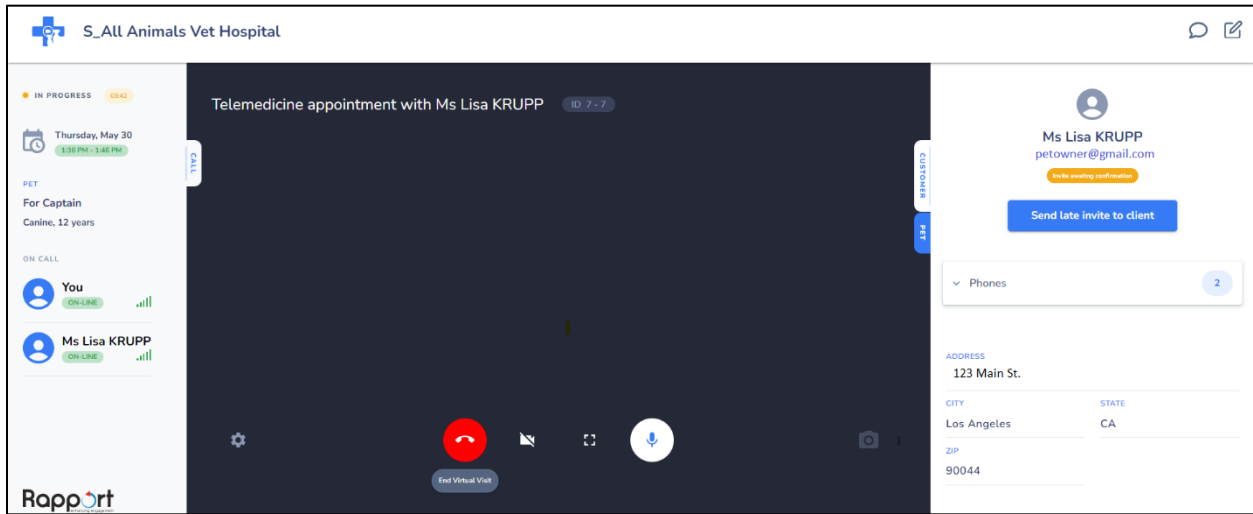
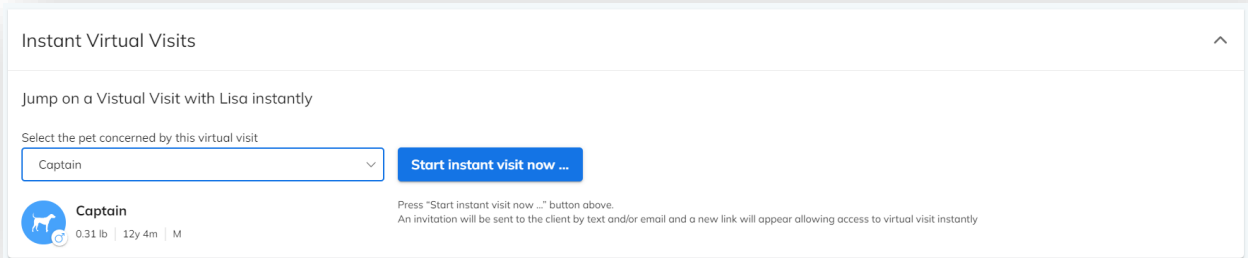
The appointments section lists all past and future appointments for all of the clients' pets. It is sorted chronologically; click the "Date" column header to reverse the sort (oldest to newest or newest to oldest).

Appointments

Date ↑	Patient	Species	Resource	Visit reason
05/25/2023 6:00:00 AM	Captain	Canine	Joe Tester, DVM (1117)	Appt type for Release:Annual Wellness/Vaccination-
05/25/2023 6:30:00 AM	Captain	Canine	Joe Tester, DVM (1117)	OB - Wellness:Annual Wellness/Vaccination-
05/25/2023 1:30:00 PM	Captain	Canine	Ima Goodvet, DVM (236)	Standard Checked In:Annual Wellness/Vaccination-test comment booking
06/23/2023 11:30:00 AM	Captain	Canine	Ima Goodvet, DVM (236)	OB - Wellness:
08/24/2023 10:30:00 AM	Captain	Canine	undefined ()	Standard:Wellness and/or Vaccinations
08/31/2023 5:00:00 AM	Captain	Canine	Joe Tester, DVM (1117)	Standard:Wellness Appointment-
09/12/2023 8:00:00 AM	Pal	Canine	Ima Goodvet, DVM (236)	Standard:Sick Appointment /Sick Pet Appointment
09/12/2023 11:00:00 AM	Captain	Canine	Joe Tester, DVM (1117)	Standard:Wellness Appointment

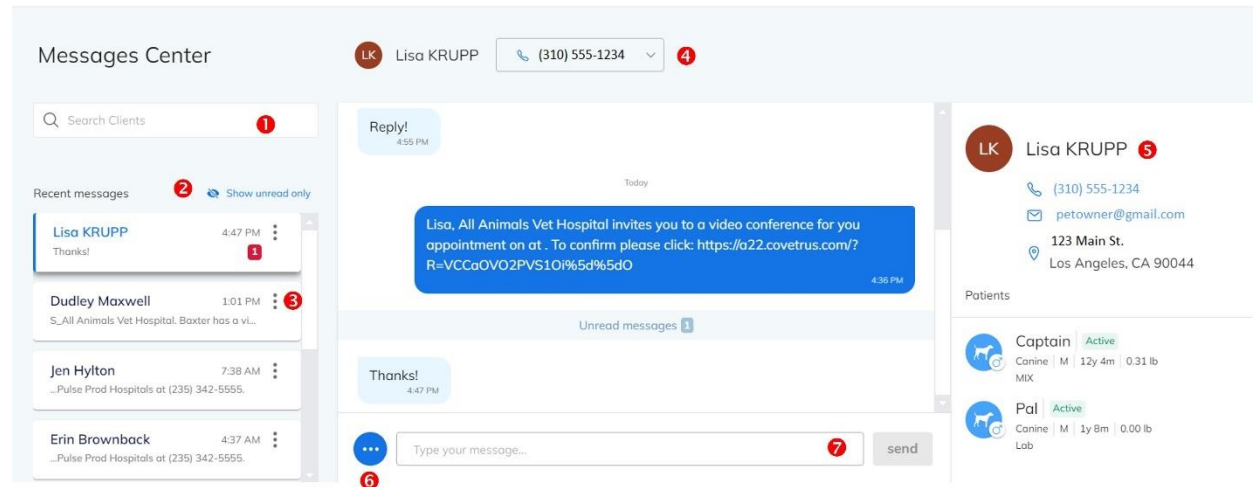
Instant Virtual Visits

Choose from the drop-down menu of active patients to start an instant virtual visit with the client. A message will be sent to the pet owner by text or email, and the visit will begin in a new browser tab.



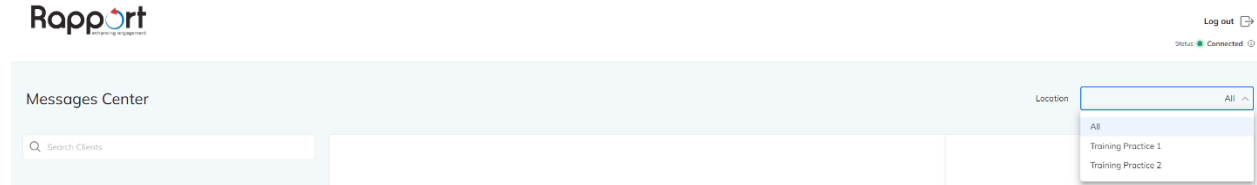
Messages

All text message conversations are accessible through the Messages Center. Messages are sorted with the most recent conversation at the top, and any conversations with clients within 30 days will appear. Unread messages are marked with a red badge.



1. To find a client to begin (or continue) messaging, type the client first or last name. As you search, possible exact matches will appear below the search box, and all possible matches will populate dynamically in the results list. Click the client name to select.
2. The recent messages list can be filtered to show only unread messages, making it easier to quickly find and respond to incoming messages
3. Click the vertical ellipsis to find more options: Pin a chat to the top of the list or mark a chat as unread. Chats can only be marked as unread if the most recent message is incoming (from the pet owner)
4. Click the drop-down menu to choose which phone number (or virtual chat, to chat with a pet owner via MyPetsWellness app) to contact. Messages cannot be viewed or created unless a contact is selected.
5. View basic information about the client and their pet(s).
 - Click the client name to bring up the client profile (see Client Details, above, for more information about this feature).
 - Click the client phone number to send an automated voice message to the client
 - Click the client email address to send an on-demand email message to the client
 - Click a pet name to bring up additional information about that pet (see Patients, above, for more information about this feature).
6. Click the ellipsis for more chat options:
 - Start a virtual visit
 - Send a share link to invite the pet owner to post an attachment to the Rapport patient record (does not post to Practice Management system client or pet record)
 - Access one of the 26 message templates to quickly send of a standard message
 - Send an image to the pet owner
7. Type a freeform message in the message box and click the send button

In multi-site accounts, there is also an option to limit the message center by location. This will limit the search to only clients that are assigned the selected location as their “home” location, and will also limit the view of recent messages to only those from clients assigned to that “home” location. Simply click the location drop-down at the top right of the page, as shown.



Reports

Most reports can be found in the Rapport legacy app – click the gear icon in the bottom left corner of Rapport to access these.

Payment History Report

The payment history report provides the practice with a log of deposits that have been collected from integrated online scheduling. Any practice with an online scheduling-enabled communications package, as well as Covetrus Payments, may utilize this feature. The online scheduling module can be configured to request a deposit for all bookings or only new clients, and all appointment reasons or only certain ones.

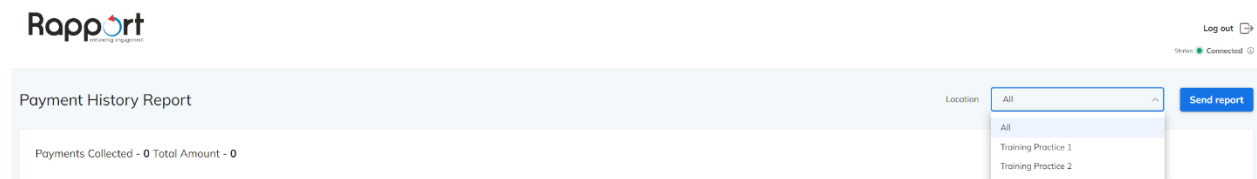
Payment History Report Send report

Payments Collected - 5 Total Amount - 125

Date received	Client	Amount	Appointment booked
01/11/2024 4:44:01 PM	Lisa KRUPP	\$ 25	1/12/2024 9:30 AM
04/12/2024 12:51:18 PM	Lisa KRUPP	\$ 25	Not entered
04/16/2024 1:26:48 PM	Lisa KRUPP	\$ 25	Not entered
04/30/2024 11:38:30 AM	Lisa KRUPP	\$ 25	5/01/2024 10:15 AM
05/28/2024 10:16:15 AM	Lisa KRUPP	\$ 25	5/29/2024 10:30 AM

This report can be sorted by date (in ascending or descending chronological order) or by client (in ascending or descending alphabetical order).

In multi-site accounts, there is also an option to filter the schedule by location. Simply click the location drop-down at the top right of the page, as shown.



Click Send Report to email the patient history report to a practice staff member to aid in payment reconciliation.