



Jane Webinar

Getting started with Jane: Your first 90 days

Tips from the Jane Onboarding team



Watch the
session replay



Remember: You don't have to do everything at once. Pick one idea from this list to try

Setting up your schedule

- ✓ **Create a treatment:** set your price and turn on online booking
- ✓ **Define your availability:** shifts indicate when you're open to see patients
- ✓ **Set your schedule into the future:** rolling availability controls how far out patients can book
- ✓ **Block your breaks early:** protect your lunch and personal time before your calendar fills up

Creating intake forms

- ✓ **Forms collect details:** demographics, health history, consents, credit cards, and insurance
- ✓ **Send automatically:** the form goes out at booking, with a 24-hour reminder if it's not completed
- ✓ **Customize it to your practice:** assign forms by discipline, staff member, or treatment type
- ✓ **Use the template library:** thousands of templates ready to customize or create your own

Collecting payment

- ✓ **Jane Payments** is integrated with scheduling, billing, and patient experience
- ✓ **US insurance billing:** get started with [ClaimMD](#) first, then link your account to Jane
- ✓ **CA insurance billing:** register with [TELUS eClaims](#) first, check your email and link to Jane

Better prompting and continued learning

- ✓ [Schedule your import](#) if you're switching from another system
- ✓ [Getting started guide:](#) your step-by-step resource for setting up Jane
- ✓ [AI Scribe:](#) spend less time on notes after every session
- ✓ [Jane Websites:](#) get found online and let patients book directly from your site
- ✓ Join the [Jane Community](#) to hear tips from other clinics

Thank you!

Have questions? Book your complimentary [onboarding call](#)

Starting your own practice?

Check out our [new practice guide](#) where we go over first steps & growth advice from experts

FAQ from the chat

Your getting started questions, answered



Where do I begin when setting up Jane?

Start with the foundations: [clinic info](#), [disciplines](#), and [treatments](#). From there, work through the setup order that makes booking possible first (discipline → treatments → shifts → intake forms), then layer in payments. Use Ted Test throughout to make the setup process feel more practical. It builds muscle memory for the actions you'll repeat every day. Not sure where to start? The [checklist for starting with Jane](#) has you covered.



What do I need to set up before scheduling will work?

Disciplines, treatments, and shifts need to exist before scheduling can work. That order matters. Set your [schedule](#) well into the future, even if you're not 100% sure of your hours yet. Jane overwrites easily, and the default 3-month rolling online availability means patients won't book further out than they should. Use the [Day view](#) for providers and the [week or monthly views](#) for the full picture. Start by [setting up shifts](#).



How do I get Online Booking live?

Shifts must be set up before [Online Booking](#) will work. Once they are, you can embed your [booking link](#) on any third-party website or share it directly. Customize your branding and add staff photos and bios to help your clinic feel more polished and approachable to a prospective patient. [Family and dependent booking](#) is also supported.



How should I use intake forms when I'm just getting started?

[Intake forms](#) are one of the most powerful tools for a new clinic. Build them right from the start. Use them to collect demographics, health histories, [consents](#), credit card info, and insurance policies all in one place. That upfront context means less back-and-forth and better-prepared first appointments. Automatic sending and a 24-hour reminder mean nothing slips through. Check out our [template library](#) to get inspired.



How do I approach charting when I'm switching to Jane?

The switch to Jane is a good moment to simplify. Rather than recreating every old template, aim for 1 to 3 that cover what you actually need. Let intake forms handle the background context so chart entries stay focused. Always chart from the Day view since it's the fewest steps. Don't skip [AI Scribe](#); it's a significant time-saver. Make sure to configure your [charting privacy](#) settings early too.

Have questions? Our team is happy to help: support@jane.app

FAQ from the chat

Your getting started questions, answered

◆ When should I set up billing and payments?

Set up [Jane Payments](#) early. It handles payments, reduces no-shows, and means you don't need a separate tool. A common mistake is manually recording payments before the money has actually arrived. Don't record a payment in Jane until you've received it. For US clinics billing insurance, get Location, Billing Settings, Staff Profile, and ClaimMD configured before you see your first patient. The [US insurance billing training hub](#) is the best place to start. Canadian clinics should get [TELUS eClaims](#) or other integrations sorted early, too. For clinics in the UK, [Healthcode](#) is available in beta.

◆ When should I migrate my data from my previous system?

Import is the last step before go-live, not the first. Give yourself a minimum of 48 hours for completion, and note that imports can't be completed on Sundays. Use the [software-specific import guide](#) for your previous system if one exists. After the import, expect some cleanup: merging duplicate patients, staff, and insurers, and reassigning treatments. The [basics of importing to Jane](#) is a good overview to read first.

◆ Does Jane have resources for specialty or multi-clinician practices?

Jane has dedicated hubs for different practice types, including [behavioral health](#), [medical](#), [medical aesthetics](#), and [mobile services](#). For multi-clinician practices, the [Advanced Scheduling hub](#) covers more complex availability and resource configurations.

◆ How should I set up staff access when onboarding my team?

Set up [staff access levels](#) thoughtfully, since not everyone needs full admin access. Configure charting privacy early, especially for multi-clinician practices. If compensation tracking matters, [Income Categories](#) and the [Payroll Guide Hub](#) are the places to start.

◆ Is there extra help available if I want more support getting set up?

Yes. Jane offers a paid dedicated onboarding service for clinics that want more hands-on support. Reach out to support@jane.app to learn more.

Thank you!

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