



Getting Started with Online Appointments

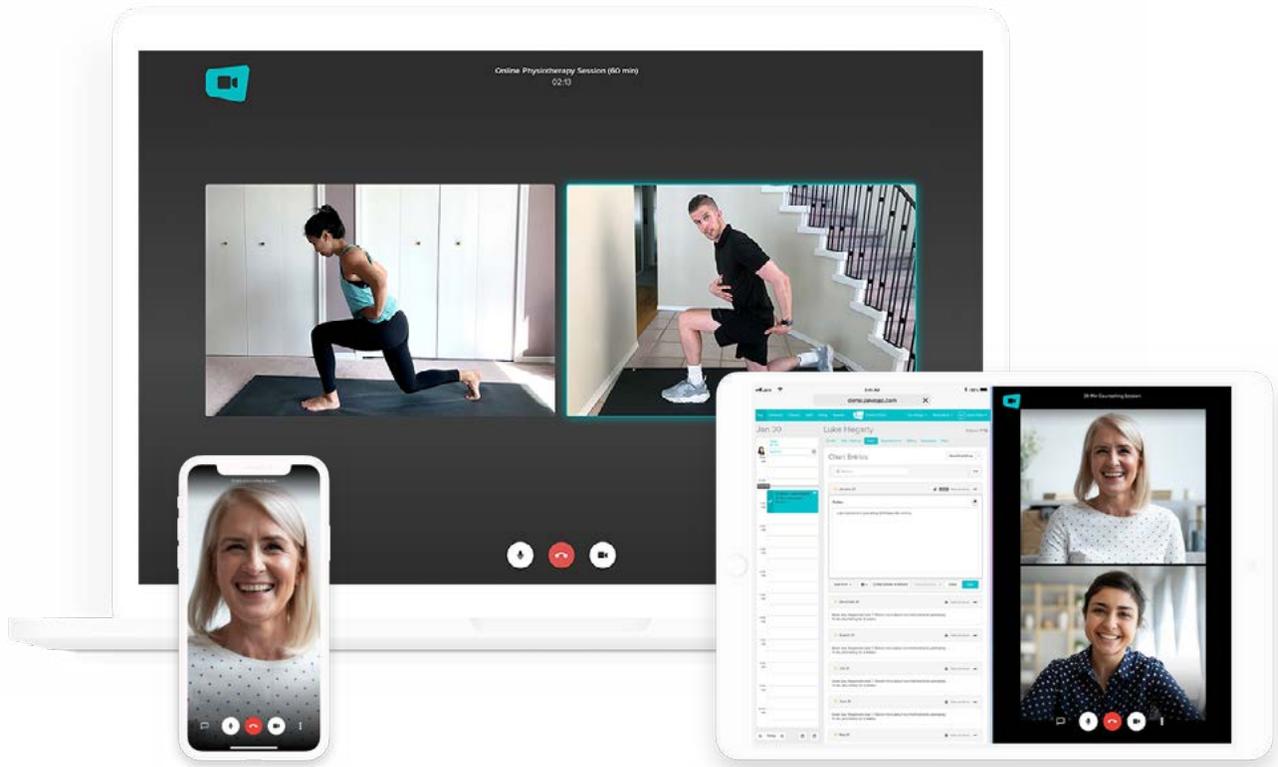
Training Book for Staff Members



The SECRET
OF GETTING
ahead →
IS GETTING
started

- MARK TWAIN

What are Online Appointments?



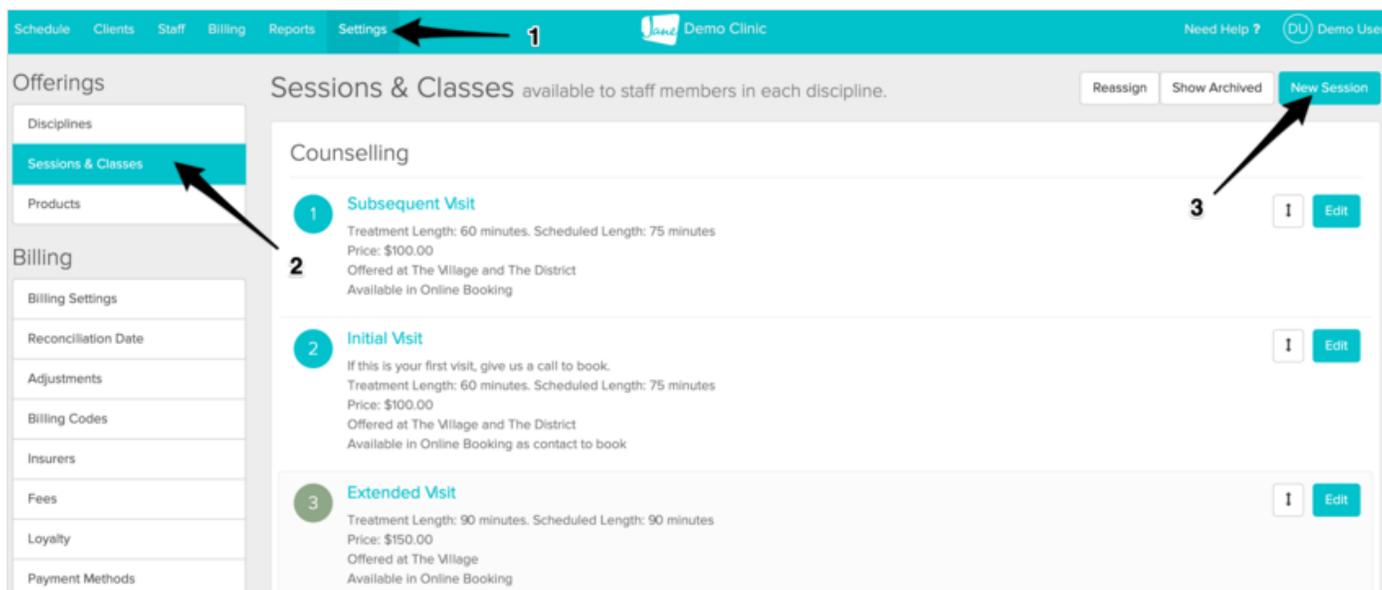
Meet face-to-face while miles apart with Jane's new telehealth system.

Online Appointments with Jane allows you to offer secure telehealth video sessions fully integrated into your Jane account.

Secure & HIPAA-compliant data transfer.

Jane's telehealth feature is built within Jane's secure infrastructure and is designed from the ground up to be secure. All data is encrypted in transit, and nothing is ever recorded or stored. And in most cases, the encrypted data flows directly from your device to your patient's device bypassing Jane's servers altogether - security by design.

Setting Up Online Appointments



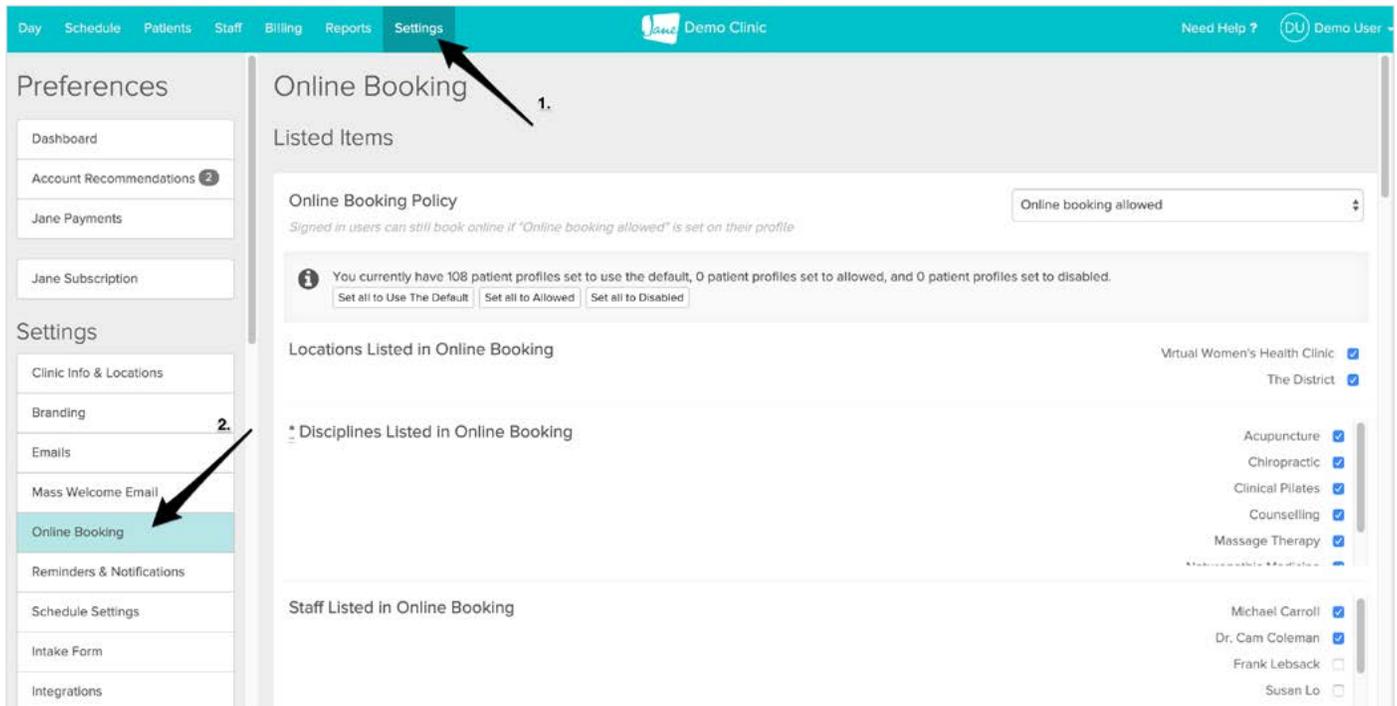
Creating a new telehealth session is actually very similar to setting up a new standard treatment.

1. A full-access user can begin by heading over to **Settings > Treatments & Classes**.
2. Click **New Treatment**.
3. Under the “In-Person or Online” drop down menu, select **Online Appointment** to indicate that this will be a session held remotely via video conference.
4. You can then proceed to fill out the remaining treatment details (name, price, duration, etc.) from this same page. If you’d like a quick refresher on how to set up the rest of the treatment, our guide on [Setting Up Treatments](#) provides additional explanations for each section.
5. You’ll want to pay a bit of special attention when selecting which location this service will be offered at. Your selection determine which locations this treatment will be available to book.
6. When you’re happy with the way your treatment is coming together, you can go ahead and click the **Create Treatment** button to finish.



Each online appointment is encrypted, anonymous, and never recorded or stored.

Setting Up Your Online Appointments To Bookable Online



If you would like your new Online Appointment treatments to be bookable online by your clients, you will want to make sure that they are set to Display in Online Booking.

1. A full-access user can begin by heading over to **Settings > Online Booking**.
2. Ensure that your clinic-wide Online Booking Policy has been set to **Allowed**.
3. Under the “Treatments Listed in Online Booking” section, make sure any Treatments you would like to be bookable online are selected.
4. When you’re finished, you can go ahead and click the **Save** button to finish.
5. Want to learn more about working with the online booking site? Here is our guide on [Setting Up Online Booking Like a Boss](#).



Did you know that you can check out how things are looking on your online booking site at any time by clicking on your name, found in the top right corner of your account, and then selecting “Online Booking” from the drop-down menu? Give it a try!

Collecting Payments for Online Appointments

Working with Jane Payments:

Jane Payments is our simple, flexible payment system where you can store client cards on their profile, accept online booking pre-payments online, and send e-invoices to clients for outstanding balances— all within Jane. To get started, visit your **Settings Tab > Jane Payments** area.

Option 1: Process Card on File

If you already have the client's credit card information stored on file, you will be able to process payment right after the session and provide a receipt using the standard payment workflow.

If the client does not yet have a card saved on file, they can add one from their My Account portal.

Learn how this works here: [Add a Credit Card from the Client My Account Page](#)

Option 2: Pay Balance Email

You will be able to send a personalized message along with an invoice for their outstanding balance to your client. This requires that the session has been arrived in order for the amount owing to reflect the appropriate balance. This option is particularly handy if you do not already have the client's card information on file, as Jane will store this information for next time once payment has been collected.

Read more about using the [Pay Balance email on our guide, Paying Balances Online.](#)

Option 3: Online Booking Policy

With Jane Payments, you'll also be able to specify an Online Booking pre-payment policy under the Settings Tab > Online Booking area.

You may want to require a client has a credit card on file or full payment prior to finalizing their booking. Here is our guide on [Online Booking Permissions](#) with a bit more information on where to set this up in your account.

Please provide payment information

Demo, to complete your booking, please pay the balance owing of \$105.00.

Appointments

Subsequent Visit with Rebecca Rowe for Demo User \$105.00

Pay Using:

VISA *1111

OR

Enter a New Card:

Card number

Enter your credit card number...

We accept VISA, MasterCard, American Express, Discover, and AMEX

Expiry Month Expiry Year

Expiry Month... Expiry Year...

CCV

CCV Code

What is this?

Pay

Collecting Payments for Online Appointments

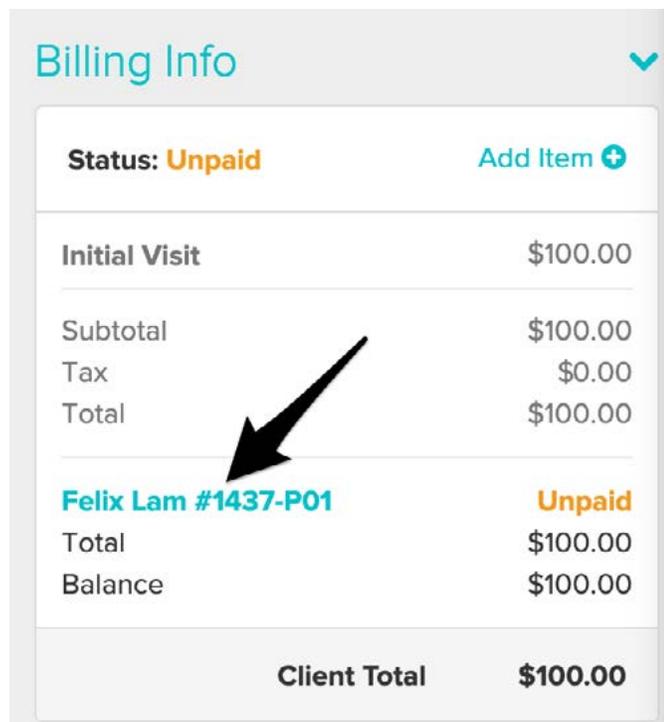
Without Jane Payments:

If you do not have Jane Payments set up, not to worry! You will still be able to generate and download an invoice for the session to send to your client.

Generating a Patient Invoice

To generate a patient invoice from the schedule:

1. Click on the completed appointment and look for the **Billing Info** section in the right-hand appointment panel.
2. From here, you'll want to click on the blue invoice text with the patient's name and invoice number.
3. When the invoice opens, feel free to add in any additional information you would like include on the invoice inside the **Details** box.
4. Click on the **Print** button on the top right to preview the invoice.
5. If everything looks good to go, you can download a PDF of the invoice to your computer, which you can then include as an attachment to an email to your client.



Billing Info	
Status: Unpaid	Add Item +
Initial Visit	\$100.00
Subtotal	\$100.00
Tax	\$0.00
Total	\$100.00
Felix Lam #1437-P01	Unpaid
Total	\$100.00
Balance	\$100.00
Client Total	\$100.00

Creating New Payment Methods

E-transfer, Paypal, or even Bitcoin :)

1. If you would like to take another payment method that isn't part of the default list, hop on over to the Settings tab and find the Payment Methods area.
2. Click on the **New Payment Method** button.
3. You'll see a create payment method screen where you can enter the details of the new payment method.



*** Virtual High-Five! ***

Your account should now be set up for offering
Online Appointments.

Next, we'll look at booking in your clients, and
beginning a session!

Booking a Client for an Online Appointment

So now that you've set up some brand new telehealth treatments, here's how you can start booking in your clients for the sessions. The process is very similar to how you currently book a standard in-person appointment.

Booking an Online Appointment:

1. From the Schedule, click the particular date and time that you would like to book the session in for.
2. When the appointment panel appears, specify the client that you will be working with using the search bar or New Patient button.
3. Next, choose the appropriate online appointment type from the Treatment drop-down menu.
4. You can then proceed to add any additional details that are required for this appointment, such as adding an insurance claim or notes, before clicking on that **Book Appointment** button to finalize the booking.
5. You'll see a video icon in the corner of any Online Appointment types on your schedule!



Here's the scoop on the notifications your clients will receive:

- Shortly after you complete the online appointment booking, your client will receive a "Thanks for Booking" email confirming their new appointment.
- On the day of the appointment, your client will receive an Appointment Reminder email 30 minutes before their appointment start time, with a link to begin the session.

Tips for Prepping Your Virtual Office Space



Location

Find a quiet, private, and clutter-free space for your online appointments. Neutral colours, plants or a bookshelf can work as an excellent background. Tip: Avoid the chance of an accidental interruption by ensuring there are no doors in the camera frame! If you haven't watched [this video](#) yet, we recommend it for a smile ;)



Lighting

Your virtual office should be a well lit space with a light source in front of you. You'll want to avoid setting up with a window or light source behind you as it can cause a dark shadow on camera.



Background Noise

Remember to mute or silence any notifications and sounds before the session (phones, alerts, alarms). If you are sharing a space with others, consider a sign for the door: "Virtual Appointment In Session."



Device Position

Be mindful of the position of your device and camera. You'll want to be at eye level so you are looking directly at your patient. Ensure you can see your full face in the frame. Stacking a few books under your laptop can work as a great trick! If you are working with two screens for documentation, position your devices so you can easily glance back and forth.

Joining On a Laptop Or Desktop Computer

Preparing to Begin your Online Appointment:

- ☑ Close down any applications that are not needed on your device.
- ☑ Check that you are using Chrome or Firefox as your browser.
- ☑ Check your internet connection at fast.com. You will need a result of 15Mbps or higher. If your internet connection isn't great, you will have the option to lower the quality, shut off the video or do an audio-only session.



The following instructions assume that you already have an online appointment booked in with a client. If not, jump back to the Booking an Online Appointment section first!

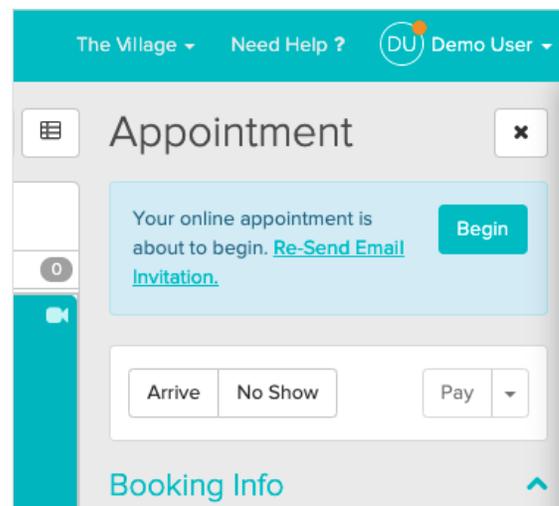
Beginning the Online Appointment

1. When it comes time to join your client for a video call, find the appointment in your Day Sheet or Schedule and click on it to open up the Appointment panel (double click from Day sheet).
2. At the top of the panel, you'll see a blue Begin button to start the session.
3. Click Begin. The video will now begin in a separate window.
4. Your browser may request access to your Camera and Microphone. Click Allow to proceed.

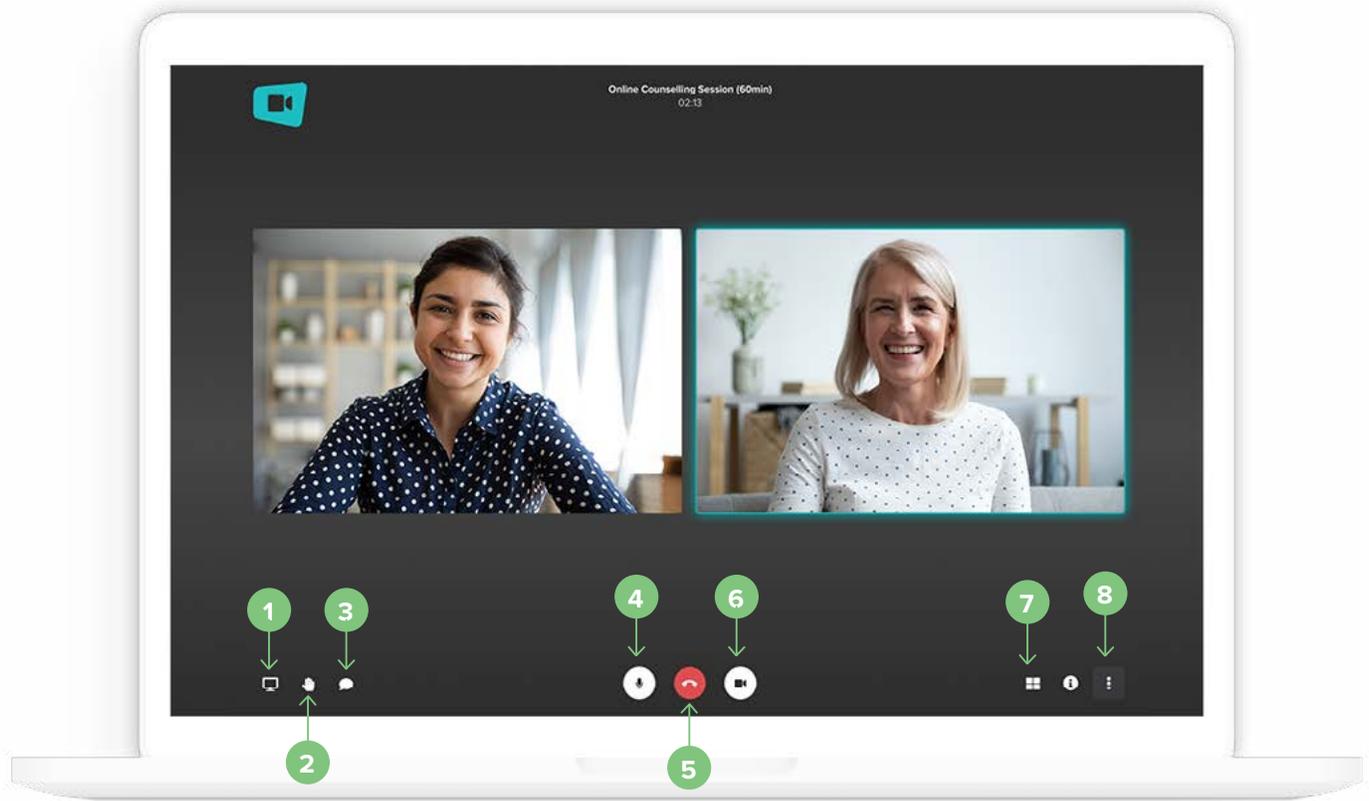
Great, your all set! Once you have joined the call, you can: mute/unmute audio, turn on/off the camera.

The Begin button will be available 1 hour before the session starts and will disappear 1 hour after the session ends.

If you would like to send a reminder notification to prompt the client to join the call, click the Re-send Email Invitation link and Jane will resend the Appointment Reminder email.



Video Settings On a Laptop Or Desktop Computer



Here's what each of the icons do, starting from the left:

- 1 Screen Share** - A picture is worth a thousand words, and sharing your screen with your patient helps share that information easier!
- 2 Raise Hand** - Click this to politely let the patient know that you want to speak.
- 3 Text Chat Window** - Use this to chat with your patient through text and emojis.
- 4 Mute/Unmute** - Great for those moments when you need to mute sounds during the call.
- 5 Leave Call** - When you're finished with your call, click here or simply close the tab.
- 6 Enable/Disable Video** - Click here to enable or disable your video.
- 7 Tile View** - Tile view lets you see everyone side-by-side.
- 8 Menu** - Inside the menu, you can change your name in the chat, change the video quality, view full screen, and view settings.

Joining On An iPad/iPhone

Prerequisite: Download the Jane Online Appointments App

Before you get started, you'll need to first download the Jane Online Appointments App! You can find it on the App Store by clicking [here](#).



The following instructions assume that you already have an online appointment booked in with a client. If not, jump back to the [Booking an Online Appointment](#) section first!



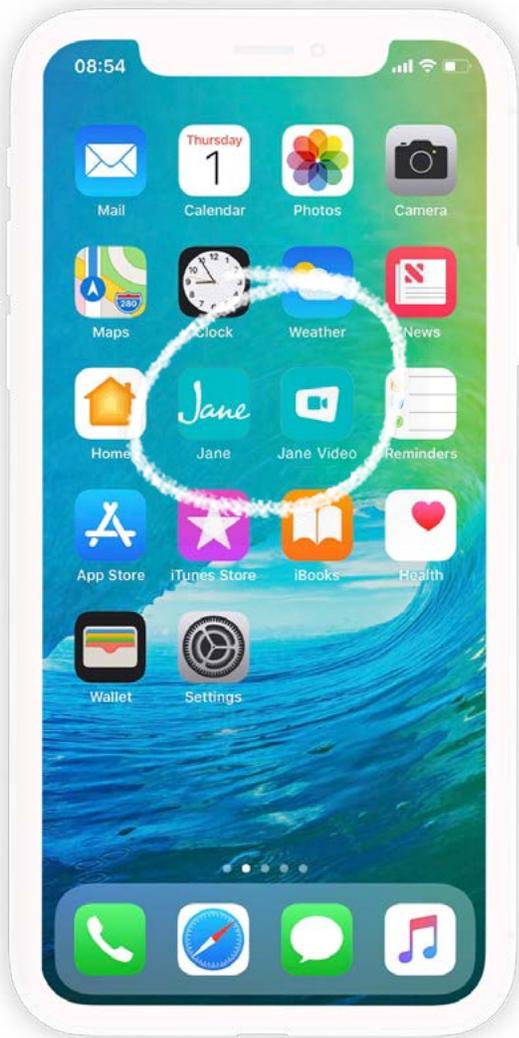
Beginning the Online Appointment

Once you have downloaded the App, you can actually just close it! This App is simply a communication tool for Jane. You will not have access to your Jane account from this tool.

1. First, you'll need to login to your Jane account. You can do this by opening your phone's web browser and entering your clinic's URL to load the sign in page. **We don't currently have a native App Store app that is specific to a clinic.** Example: clinicnamehere.janeapp.com/admin
2. When it comes time to join your client for a video call, find the appointment in your Schedule or Day Sheet view, and tap on it to open up the Appointment panel (double tap appointment from the Day view).
3. At the top of the panel, you'll find a button to Begin the online appointment— tap the Begin button to start the session.
4. After tapping Begin, you'll see the Online Appointments App open to begin the video session.
5. Next, the Jane Online Appointments App will request permission to access your Microphone and Camera.
6. Tap OK to proceed.
7. Great, your all set! Once you have joined the call, you can: mute/unmute audio, turn on/off the camera.

 [Watch a Video Tutorial Here!](#)

I Have Two Jane Icons – What’s The Difference?



Jane Online Appointments App:

This is the Jane Online Appointments App. Once you have downloaded it from the App Store it will just hang out here on your home page!

You will not be able to access your account from the App. It is simply needed as a communication tool for Jane!



Jane Account Shortcut:

This is a shortcut you can create on your phone’s home screen in order to log-in and access your Jane account with a single tap!

Creating a shortcut for your Jane account is a great option if you regularly access Jane on your phone. If you’re interested in creating one, flip over to the next page for instructions.

If you have not saved a Jane shortcut, you can also access your Jane account by opening your phone’s web browser and entering your clinic’s URL to load the sign-in page.

Jane Account Shortcut On Home Screen

If you regularly access your Jane account on your phone, you can create a shortcut on your phone's home screen. This will give you access to Jane with a single tap, and Jane will fill up the whole screen, without the pesky browser address bars at the top and bottom.

1. Sign in to your Jane account using the Browser on your Device.

Note that you'll need to be using Safari on iOS (iPad/iPhone) and Chrome on an Android device. If you regularly open and view PDF documents, it would be best to run Jane directly from Safari instead of a bookmark. Apple designed their bookmarks in a way that prevents easily navigating out of an opened document.

Be sure you're not using a private or incognito browser if you want your browser to remember your username and password for easier access, or alternately use a private window if you don't want to be remembered.

In either case be sure you have a password on your phone or device for an extra step of security.

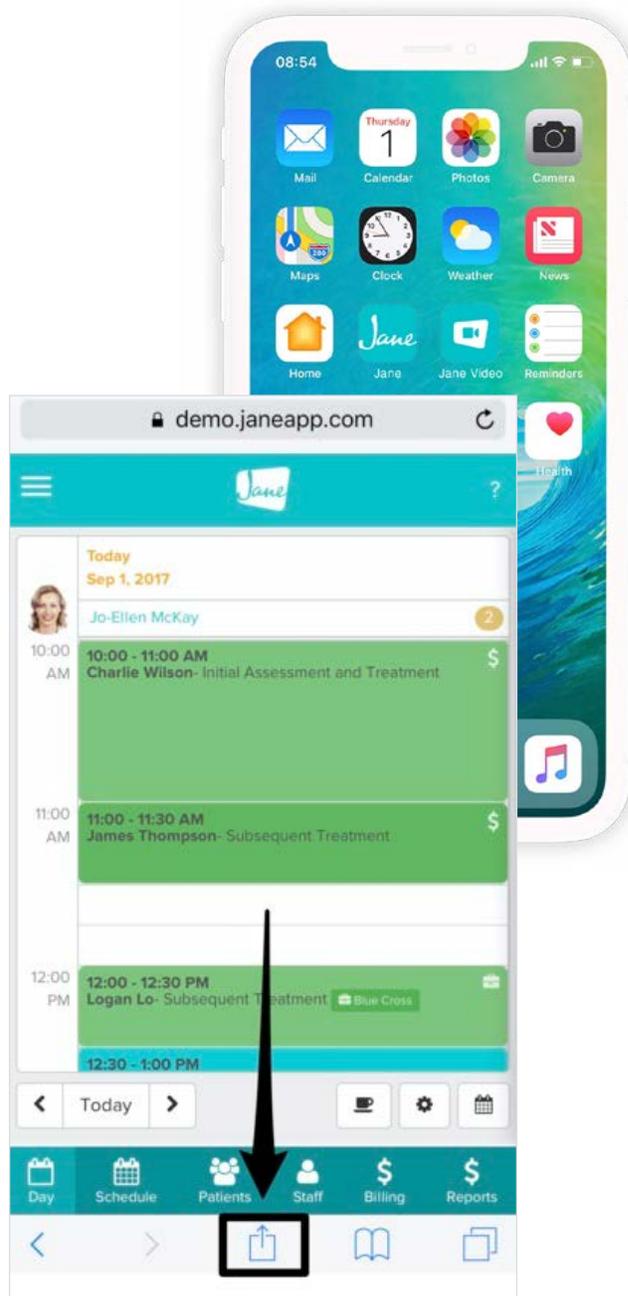
2. Create the button

iOS (iPhone/iPad):

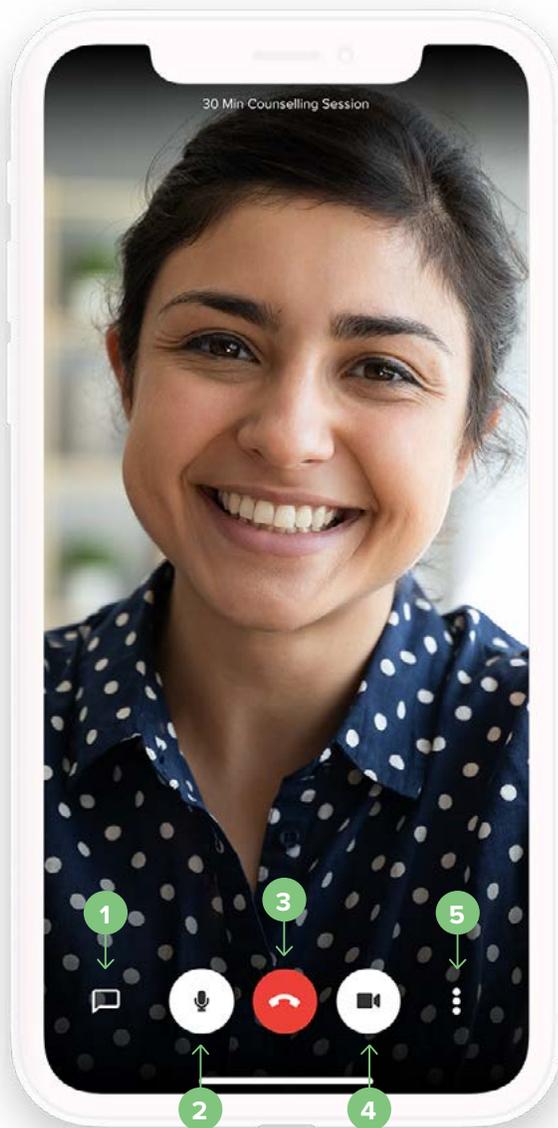
Enter the Share option menu at the bottom of your browser, and then click the "Add to Home Screen" button.

Android:

Click [here](#) for instructions.



Video Settings on an iPad/iPhone



Here's what each of the icons do, starting from the left:

- 1 Text Chat Window** - Use this to chat with your patient through text and emojis.
- 2 Mute/Unmute** - Great for those moments when you need to mute sounds during the call.
- 3 Leave Call** - When you're finished with your call, click here or simply close the tab.
- 4 Enable/Disable Video** - Click here to enable or disable your video.
- 5 Menu** - Inside the menu, you can change your sound device, toggle the camera, enable low bandwidth mode, and enter tile view.



Please note Screen Share is unavailable on IOS.

Tips for Charting During Your Online Appointment Session

Nothing hones your multi-tasking abilities better than running and maintaining a busy clinic! In particular, every practitioner strives to refine their ability to stay engaged in session with a client, meanwhile providing empathetic feedback and diligently jotting down detailed notes about the session— phew!

Here are some useful tips that we’ve picked up from clinics along the way on keeping up with client notes during an Online Appointment appointment.

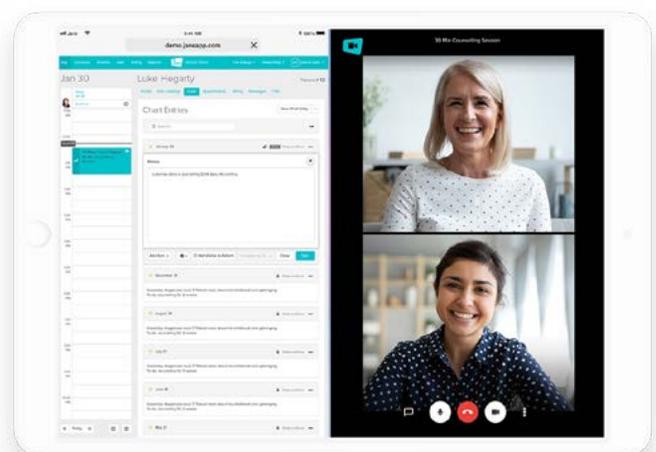
Tip #1 - Split Screen

With the split screen option, you’ll be able to see your client as well as their clinical notes at the same time. When a new Online Appointment conference is launched, Jane will automatically pop this interface in a separate window. By resizing both the Client’s Chart area in Jane and the video chat window, you can get the best of both worlds! Here’s how to access split screen mode:

On a Mac Device: Hover your cursor over the green full-screen button in the upper-left corner of the video appointment window. Click and hold the button, and then choose “Tile Window to Left of Screen” or “Tile Window to Right of Screen” from the menu. Next, click your Jane account on the other side of the screen to begin using both windows side by side!

On a Windows Device: Select and drag the video appointment window over to the left edge of your screen to snap into split screen. You should now be able to see your Jane account behind the half window that’s to the right. Select the window to use both side by side!

On an iPad: Begin in your web browser, with your Jane account open to the patient’s chart. Next, swipe up to reveal your dock. Find the Jane Online Appointments App, touch and hold, and then drag it upwards and over to one side. You should now be in split view!



Tips for Charting During Your Online Appointment Session

Tip #2 - Quick Tab Shortcuts

If you prefer working out of a full-sized window while charting, you may find that using Quick Tab shortcuts to jump between windows more convenient. This is also a great option if you are only using the audio component during your Online Appointment session— you can quickly jump between windows if you would like to mute/unmute yourself during your conversation.

On MacOS devices, you will be able to use the Quick Switch feature between browser windows (e.g. Chrome) by using the keyboard shortcut: CMD + `

On a Windows devices, you will be able to switch between application windows using the shortcut: Alt + Tab

Tip #3 - Dual Screens

For those of you who have access to multiple screens or devices, charting during your video conference will be a breeze. You can put your client's video up on one of your monitors, meanwhile jotting down your notes on the other monitor at the same time.

Alternatively, since you can log into Jane on multiple devices — if you have two computers OR a computer and a tablet device, you could have the video conference running on one device meanwhile have the client's chart area open on the other.

How Clients Connect For Online Appointments

Your clients have two options to connect for their appointment:

It's almost time for your appointment.

Tuesday
April 21, 2020
8:00am

Online Video Session with Rebecca Rowe

 Begin your online appointment here
It's nearly time to begin your online appointment. Click the button below to begin.

We recommend you use Chrome to join this call. If you are on an iOS device, we recommend using the Jane Online Appointments app from the app store. (Safari is audio-only).

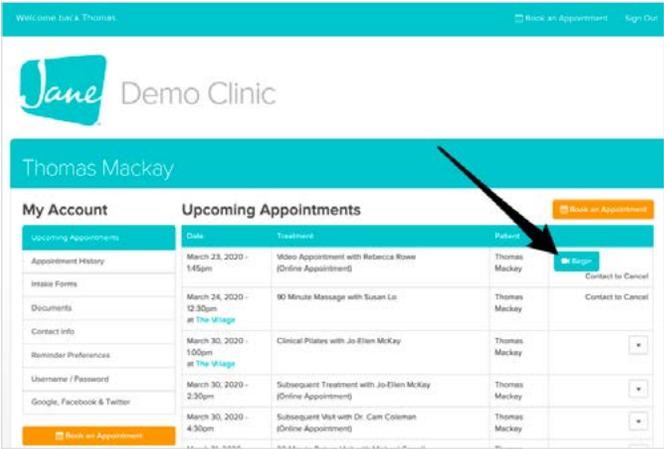
[Begin Your Online Appointment](#)

Join via Email Appointment Reminder:

Your client will receive an Appointment Reminder email sent 30 minutes before their scheduled appointment time with a link to begin the session.

Join via My Account Portal:

Alternatively, they can access this same button by logging in to their account on your clinic's online booking site, using the Sign In button in the top right-hand corner. Once logged in, they'll see a blue Begin button next to their appointment.



Welcome back, Thomas. [Book an Appointment](#) [Sign Out](#)

Jane Demo Clinic

Thomas Mackay

My Account **Upcoming Appointments** [Book an Appointment](#)

Upcoming Appointments	Date	Treatment	Platyp	
Appointment History	March 23, 2020 - 1:45pm	Micro Appointment with Rebecca Rowe (Online Appointment)	Thomas Mackay	Begin Contact to Cancel
Intake Forms	March 24, 2020 - 12:30pm	90 Minute Massage with Susan Lo at The Village	Thomas Mackay	Contact to Cancel
Documents	March 30, 2020 - 10:00pm	Clinical Plates with Jo Ellen McKay at The Village	Thomas Mackay	
Contact info	March 30, 2020 - 2:30pm	Subsequent Treatment with Jo Ellen McKay (Online Appointment)	Thomas Mackay	
Reminder Preferences	March 30, 2020 - 4:30pm	Subsequent Visit with Dr. Cam Coleman (Online Appointment)	Thomas Mackay	
Username / Password				
Google, Facebook & Twitter				

[Book an Appointment](#)

Training Resources For Your Clients

To help make sure joining a call is easy for your clients, we've created a few resources you can pass along!

Training Video - For Patients

Here's a video tutorial you can pass along to your clients covering all the steps for getting connected: <https://vimeo.com/401661361>

Training Guide - For Patients

We also have a step-by-step written walk through with photos that you can pass along. This guide walks your patients through each step to connecting for their upcoming Online Appointment.

For Patients - [How to Begin Your Online Appointment](#)

Test My Setup

Your clients can test to confirm their camera and microphone are working for the video call before their appointment begins. Here's a guide you can share with them on how to test their setup:

For Patients - [How to Test Your Video Before Your Online Appointment](#)

Troubleshooting Tips

If your clients are experiencing any trouble with their Online Appointments, here are some useful suggestions you can send over for [Troubleshooting Your Online Appointment](#).

Online Appointments FAQ's

What Browsers and Devices are currently supported?

Our beta release is best experienced on a computer or laptop using Chrome or Firefox. Android devices work best with Chrome. If you're on an iOS device (iPhone, iPad) you will need the Jane Online Appointments app which is available on the app store.

Check your internet connection at fast.com. You will need a result of 15Mbps or higher. If you're seeing a number measured in Kbps, that's not good news. If your internet connection isn't great, you will have the option to shut off the video and do an audio only session.

Will I be able to record audio or the chat communication?

Video, audio or chat communication cannot be recorded during an Online Appointment session. This approach ensures that this feature remains HIPAA compliant and addresses major privacy concerns around telehealth posed by clinics.

Can the platform support group conferencing?

Jane's Online Appointments are currently one-on-one at this time as we launch the early stages of the feature, however, support for group conferencing will be something that we look to implement later down the line as we iron out the wrinkles.

Do you know whether patients are eligible to submit insurance claims for teleconference sessions for my discipline and location?

We recommend checking in with your professional association OR the insurance company directly for the most accurate and up-to-date information on which appointments types are eligible for reimbursement and how to code and submit them.

If you're looking for a bird's eye view of health insurance companies regarding Telehealth in Canada and, more specifically, in your province, this guide offers a quick look at insurance companies that have updated their Telehealth coverage based on your location and discipline: [Canadian Telehealth Insurance Resources](#).

Does the practitioner need to join the call first or can the patient start the call?

Either party can join the call first. They will only see themselves until the other person joins the call. The call will remain open indefinitely while at least one person is in the call and will be available to re-join an hour before until an hour following the end of the appointment.

Our full list of FAQs is available on our website [here](#).