JANE'S GUIDE
Here's all the help you need to use Jane.

Email & SMS Reminders

NOTIFICATIONS & REMINDERS > EMAIL & SMS REMINDERS

9 min read

Balance Plan   **Practice Plan**   Thrive Plan   **Legacy Plans**

With all the things people have to juggle in this world, isn't getting a reminder lovely? We think so. That's why Jane lets you send your patients or clients automatic email and text message (SMS) reminders before each appointment. You can offer multiple reminder options, such as:

- an email reminder 48 hours before the appointment
- a second email reminder 12 hours before the appointment
- a text message reminder 3 hours before the appointment

> 💡 Heads up — while email reminders are available on all of our plans, SMS reminders are available only on Legacy, Practice, or Thrive plans.

You can decide and configure whatever options you'd like to offer within the **Settings** tab > **Reminders & Notifications** within the left sidebar menu. Next, click on the blue **Edit** button to the right of the reminder type you'd like to edit or on **Add Reminder** to create a new one.

> Looking for information on **Intake Form Reminder Emails**? Check out our guide **Intake Form Reminder Email FAQ (https://jane.app/guide/intake-form-reminder-email-faq)**.

It's almost time for your appointment.

Saturday
February 7, 2026
7:47am PST

O2Derm Facial with Rohan Mehta
Location: The Village

![Jane] Demo Clinic

If you are no longer able to make this appointment, please visit your My Account page to cancel.

Please note that cancellations within 24 hours of your appointment are subject to a cancellation fee.

Demo Clinic

Book an Appointment

Adding a Reminder

SMS Reminders

When choosing the SMS delivery method, you'll see the following options:

- Send Reminder - How many hours or days before the appointment to send the reminder
- Subscribed by default - New patients will be subscribed to this reminder after they consent to receive SMS messages. * They can consent to receive SMS messages after booking online for the first time, or you can opt them into SMS reminders from their profile after receiving consent from them.
- Enabled - If you ever need to temporarily disable reminders of this type, you can uncheck this setting.

SMS availability varies by region and is offered in select locations. Have questions? We're here to help at support@jane.app.

Email and Phone Reminders

For email and phone reminder types, you'll see the following options:

- Delivery Method - Email or Phone
- Send Reminder - How many hours or days before the appointment to send the reminder
- Subscribed by Default - New patients will be automatically subscribed to this reminder when their profile is created.
- Enabled - If you ever need to temporarily disable reminders of this type, you can uncheck this setting.
- Patient selectable - Allow patients to opt into this reminder. If unchecked only staff can opt a patient in or out

New Reminder

Delivery method – *Required*

○ Email
○ Text Message (SMS)
○ Phone (Not Automated)

Send Reminder – *Required*

2 days	⌄

☐ Subscribed by Default
New patients will be automatically subscribed to this reminder.

☑ Enabled
Enable deliveries for this Reminder. Uncheck to temporarily stop deliveries.

☑ Patient selectable
Allow patients to opt in or out of this reminder. If unchecked, only staff can change this reminder for the patient

Save

Tips for Reminder Types

It's nice to offer your patients a few options, but not too many. We recommend an email reminder before your late cancellation period. That way, patient's have a chance to cancel without a penalty. This reminder could be enabled by default. And then offer a second email reminder 12 hours before, and maybe a text message a few hours before. You can click the "View Preview" button to see what the reminder will look like.

Preview SMS Reminder

Your appointment with Dr. Marcus Gregory is in 2 hours at 7:26pm. See you shortly. - Demo Clinic

Phone Reminders

If a patient doesn't have an email address or the patient has opted into Phone Reminders, they will be added to the Phone Reminders list for your staff to call. Read about the **phone reminders list here (https://jane.app/guide/phone-reminders-list)**.

Additional Notes

Subscribed by Default

If your clinic has the **Subscribed by Default** setting enabled in the *Reminders and Notifications* settings, patients must first opt-in to receive SMS reminders before they will begin to receive any SMS reminders. Once the patient has consented to receiving SMS Reminders, any notifications set up as **Subscribed by Default**, will then automatically be sent.

Online Reminder Pop-Up

When patients book an appointment online, they'll see a pop-up window as part of the booking process where they can opt-in to the reminders they would like to receive. The way the pop-up appears may vary depending on your clinic's settings and use of Subscribe by Default. For existing patients of a clinic, they'll receive the pop-up as well where they can confirm or change their reminder preferences.

> **Note** 📍 : *This pop-up will appear if there is a reminder delivery type the patient is not opted-in to.*

Here's what the pop-up looks like when reminders are set to Subscribe by Default:
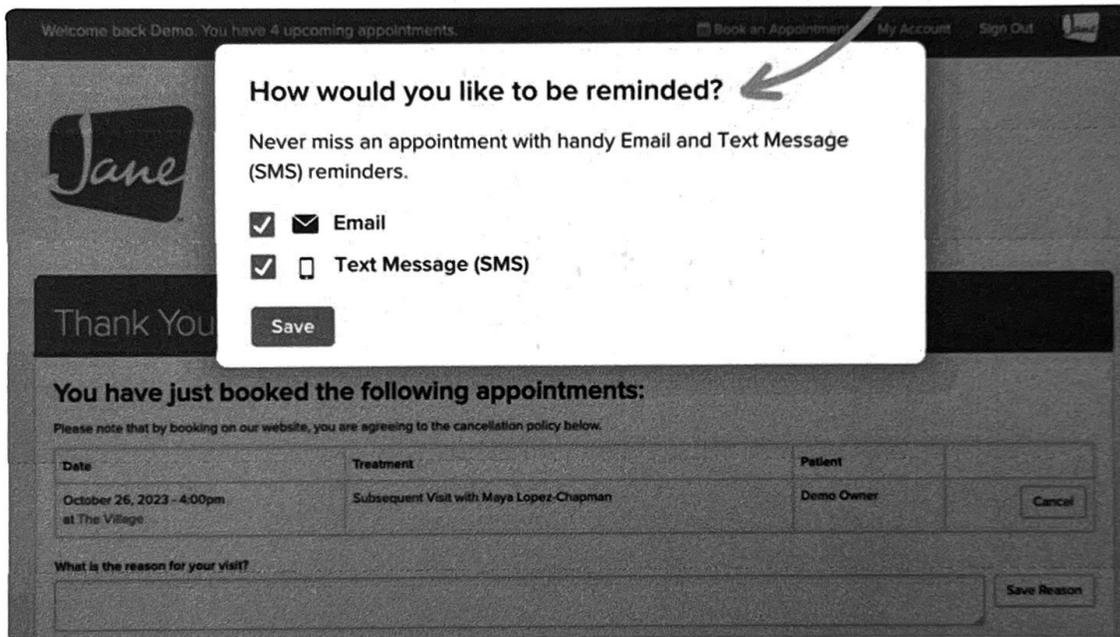
And here's what the pop-up looks like when reminders are not set to Subscribe by Default:
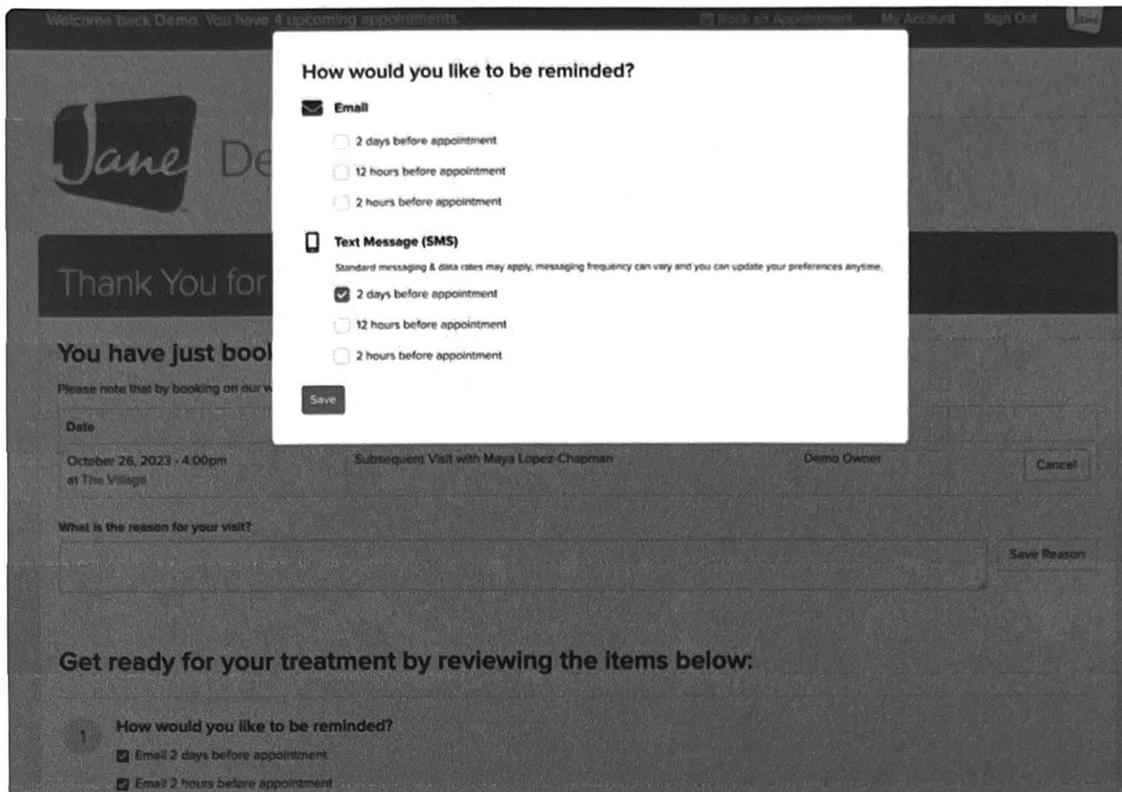
FAQ

Can I customize the language for my email and text reminders?

You sure can! Language for both reminder types can be customized by a Full Access user in **Settings** > **Language** > scroll to one of the **SMS Appointment Reminder** options. Check out our **Customizing Language in Jane (https://jane.app/guide/customizing-language-in-jane)** guide for tips and tricks on this topic.

When a new patient profile is created, will they be automatically opted into SMS reminders that are "subscribed by default"?

Great question. We want to make sure patients are consenting to receive SMS reminders, so new profiles are not automatically opted into SMS reminders. However, you can opt a new patient profile into SMS reminders if you've received consent, or the patient can opt themselves in when they book online, as well as on their intake forms, and in their **My Account** area.

When my patient opts in to get SMS reminders when they book online, will they get all of the SMS reminders set as 'subscribed by default'?

Yes — if your patient opts in to receive SMS reminders while booking online, they'll automatically receive all the SMS reminders that you've set as 'subscribed by default'.

What phone number will my patients receive automatic SMS notifications/messages from?

It depends on where they're located. Patients in Canada will receive SMS notifications from a toll-free number, and patients in other locations will receive notifications from a local number.

Can I manually resend an appointment reminder?

Absolutely! To start, you'll want to head over to the **Patient's Profile** and scroll to the *Reminders* widget. Next, click on the **Email** button.

Louise Belcher   Patient # **101**

Profile Edit / Settings Chart Appointments Billing Messages Files Physitrack Groups

| 3 | 2 | 0 | 3 | $63.⁰⁰ | $0.⁰⁰ | $13.⁰⁰ | $0.⁰⁰ |
| Total Bookings | Upcoming Appointments | No Shows | Hours Since Last Visit | Claims Outstanding | Private Outstanding | Credit | Private Balance |

👤 Louise Belcher

📞 ☎ (905) 832-9742 [Primary]
   ☐ (416) 908-3214

✉ louiseb@example.com
   Louise has not verified that this email address belongs to them and that they are successfully receiving emails from Jane. Click here to remind Louise to confirm their email address.

🏠 North Vancouver BC
   CA

💼 MSP Supplementary Benefits
   ❶ Please enter a valid birthdate and valid Personal Health Number

$ Billing Notices
  No billing notices

📅 Louise's next visit is in an hour.

60 Minute Massage with Zoey Swift
Thursday June 6, 2024 4:30 PM

Pickle Ball Court 1 with Bob Belcher
Thursday June 6, 2024 7:00

Louise has 2 upcoming a

☑ Send Now
✐ Add Message...   **2.**

→ View All   ✉ Email ▾   **1.**   🖶 Print

From there, you'll have the option of adding in a message custom to that specific patient, or just sending the notification off. At the moment, Jane does not have the ability to resend SMS notifications.

Can I send an SMS notification to two phone numbers?

No - at the moment only one mobile number can be added to a patient's profile for SMS notifications. There isn't a way to add another field for a secondary number. Additionally, our **Relationships (https://jane.app/guide/client-relationships)** is currently only available for sending copies of email notifications.

We'd love to hear your thoughts on why this feature would be helpful to you. You can [share your thoughts and vote on the existing request here]. Check out this guide on **Feature Requests (https://jane.app/guide/feature-requests)** that walks through how our team uses this page in more detail.

If a patient has several appointments on the same day, will they receive separate SMS and Email reminders for each one?

To avoid overwhelming patients with multiple notifications, Jane will only send one reminder per type (email or SMS). This single reminder will include details of all appointments scheduled for that day. Here's an example:

Patient **Bob** has two appointments coming up on the same day, and the Demo clinic has the following reminders set up:

- 2-Day Email Reminder
- 2-Day SMS Reminder
- 2-Hour SMS Reminder

Jane will only send of **one** email and **two** SMS reminders using the *Appointment Reminder (Multiple Appointments)* email and *SMS Appointment Reminder: Multiple Appointments Same Day* templates.

How can I preview the emails sent from Jane to my patients?

A staff member with **Full Access** can head over to the **Settings** tab and click on **Emails** within the left sidebar menu.

Schedule Patients Staff Billing Reports [Settings] **1.**   Demo Clinic

Preferences

🔍 Settings Search...

Dashboard

Account Recommendations ❹

Jane Payments

Settings

Clinic Info

Locations

Security

Branding

[Emails] **2.**

Mass Welcome Email

Emails

Preview the various emails Jane sends patients.
To change the language in these emails, click on **Language** in the side panel.

Preview Email :

[Select an Email... ▾] **3.**