MY PSICO AGENDA

Agenda Guide

Complete handbook for therapists

The calendar and clinical-management software for psychologists, therapists and psychology practices.

🌐 mypsicoagenda.com

User guide · English · June 2026

Welcome to **My Psico Agenda**, the clinical scheduling tool designed so you can devote your time to what truly matters: your patients. In this guide you will learn, step by step, how to manage your calendar, your appointments, your invoicing and much more. Treat it as your reference manual: come back to it whenever you need.

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1 Plans and pricing

My Psico Agenda has **no lock-in**: pick your plan and cancel anytime. Every plan includes all clinical features; what changes is the monthly quota of **Verifactu invoices** and automatic **WhatsApp reminders**.

⭐ Júnior

19,99 € / month

Ideal to get started in private practice.

- ✓ **Patient portal**
- ✓ Unlimited calendar, patients and vouchers
- ✓ Clinical history and consents
- ✓ Unlimited centers and rooms
- ✓ Unlimited manual invoicing
- ✓ 50 Verifactu invoices / month
- ✓ 50 automatic WhatsApp reminders / month
- ✓ Unlimited manual reminders
- ✓ 50 MB of files per patient

MOST POPULAR

🚀 Sénior

39,99 € / month

For busy practices with recurring patients.

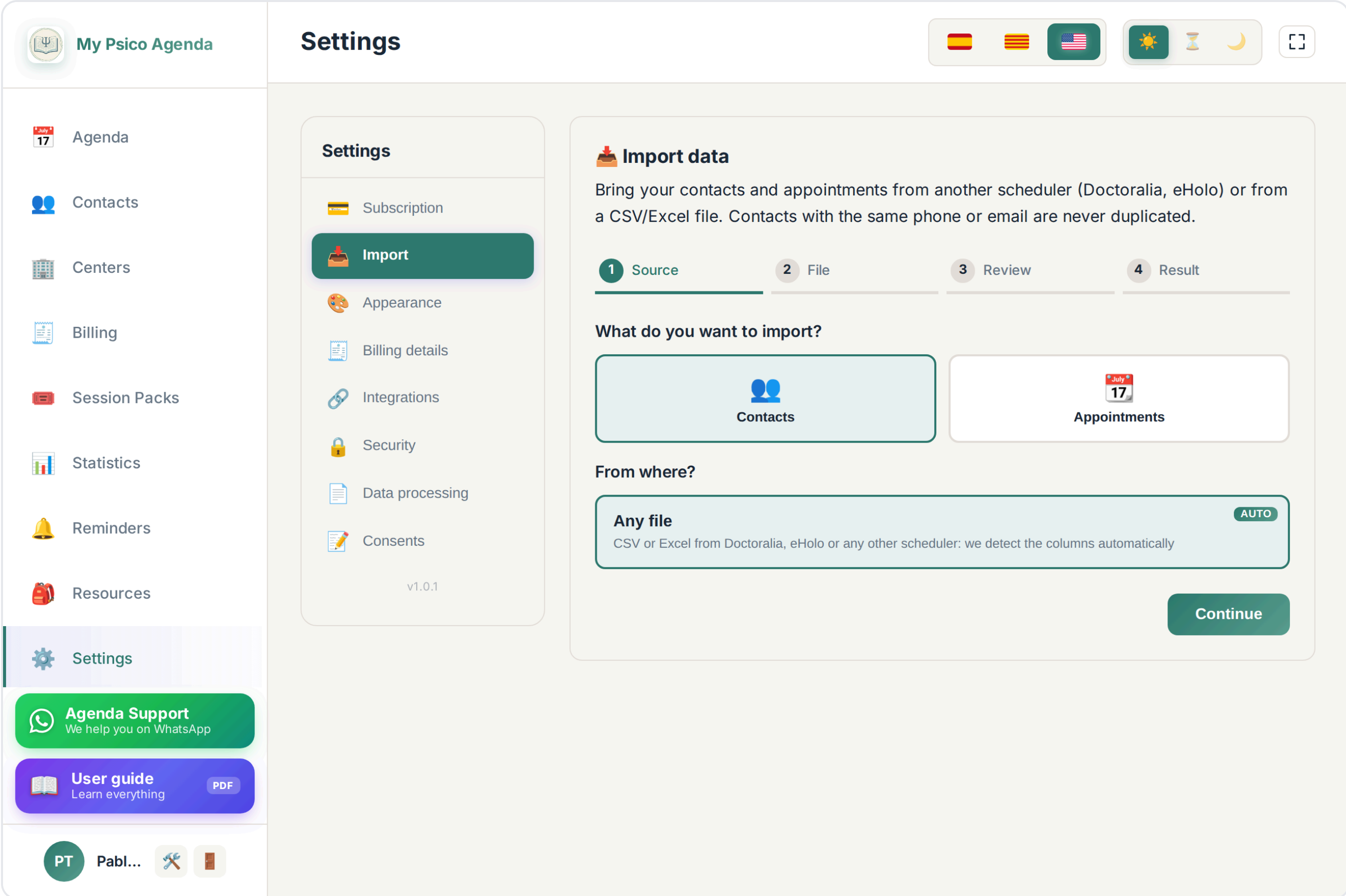
- ✓ **Patient portal**
- ✓ Everything in Júnior
- ✓ 200 Verifactu invoices / month
- ✓ 200 automatic WhatsApp reminders / month
- ✓ 200 MB of files per patient
- ✓ ASD / ADHD resources (music and games)
- ✓ Priority support

No lock-in · VAT not included · mypsicoagenda.com

💡 **Tip:** Switch plan or cancel anytime from **Settings · Subscription**. Run a practice? There are **Center Mini** and **Center Super** plans.

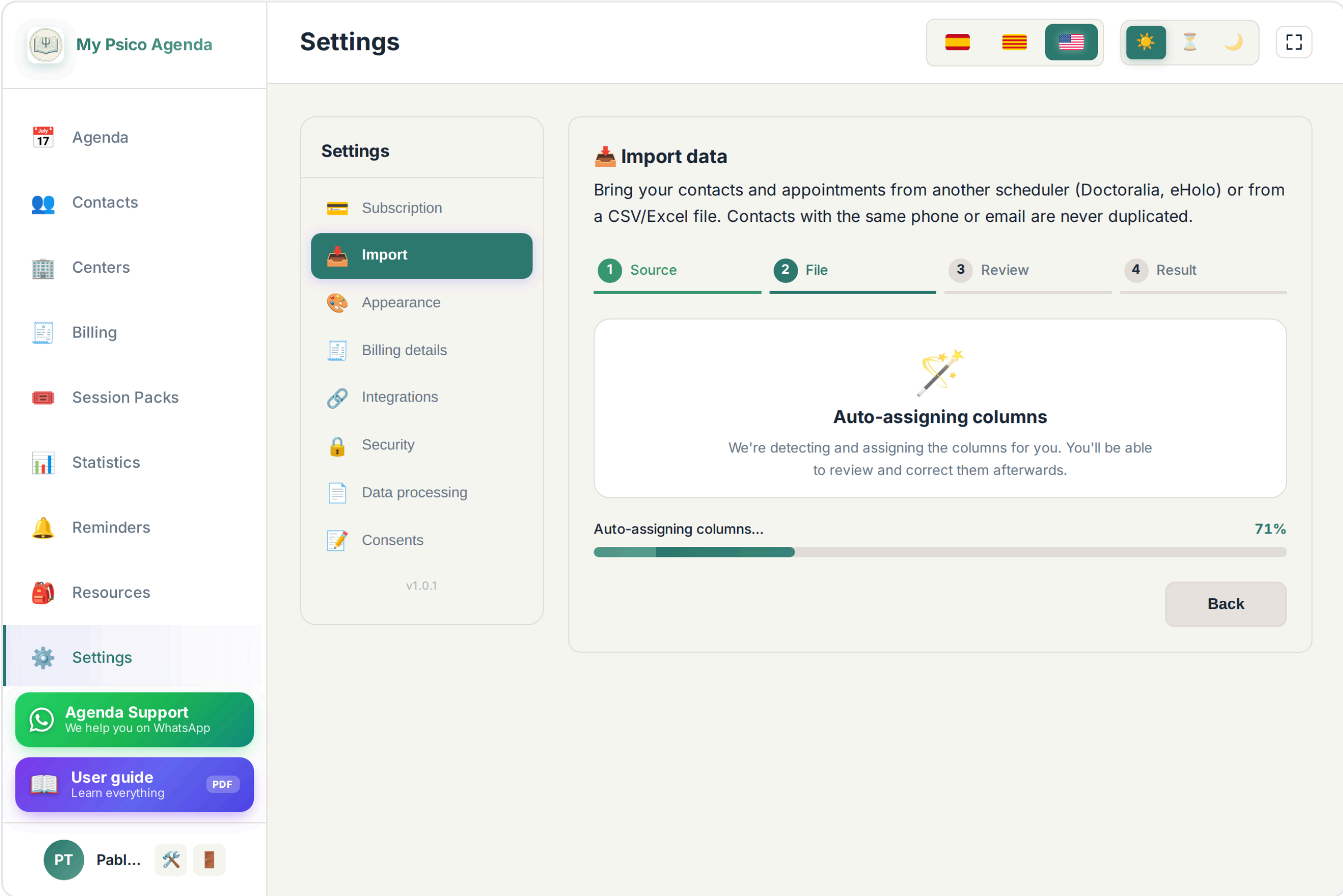
2 Import contacts and appointments

Bring your patients and their appointments from another scheduler (such as **Doctoralia** or **eHolo**) or from a CSV/Excel file, without typing anything by hand. It is the fastest way to get started: in a few steps your practice will be loaded.

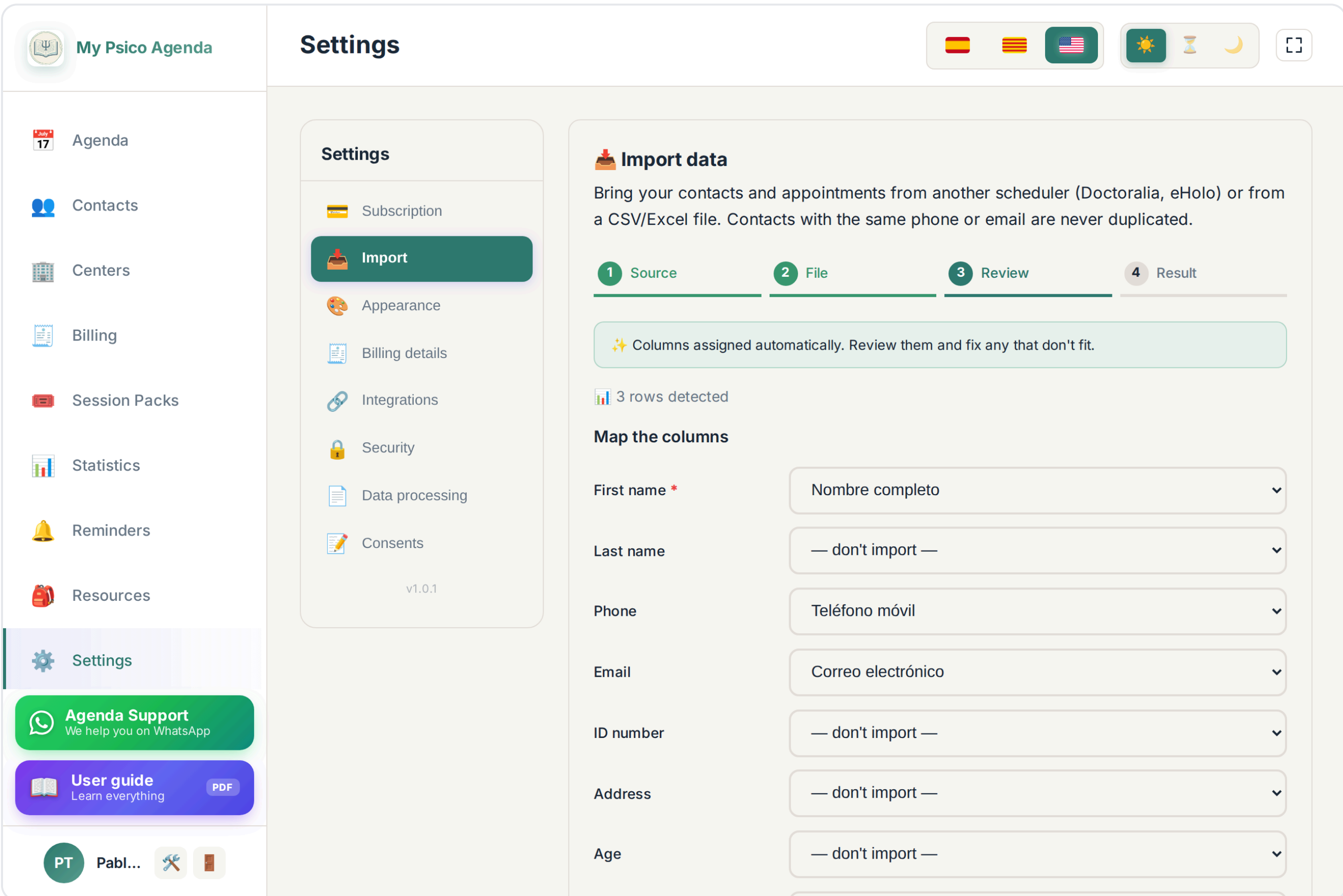


Choose whether to import contacts or appointments. The wizard detects the columns automatically, whatever the source scheduler.

Upload your **CSV or Excel** file (up to 200 MB). The wizard reads the columns and assigns each one to the right field (name, phone, email, date…). If there is no clear match, it leaves the field unassigned.

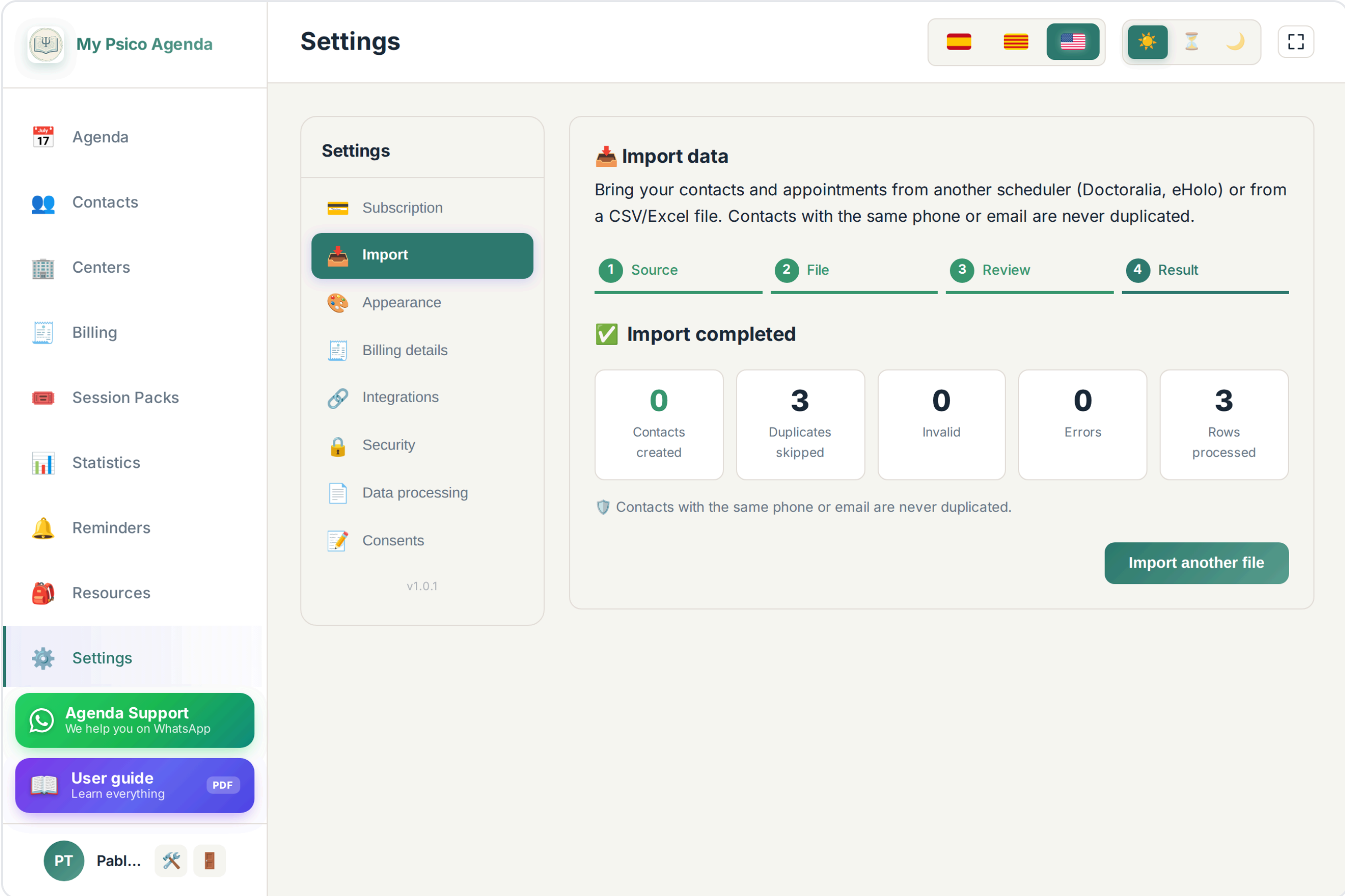


Auto-assignment: the columns are detected and assigned automatically for you.



Review the assignment and fix anything before importing. Whatever does not fit stays unassigned.

1. Go to **Settings › Import**.
2. Choose what to import: **contacts** or **appointments**.
3. Upload the CSV or Excel file (up to 200 MB).
4. Review the automatic column assignment and adjust it if needed.
5. Click **Import** and review the final summary.

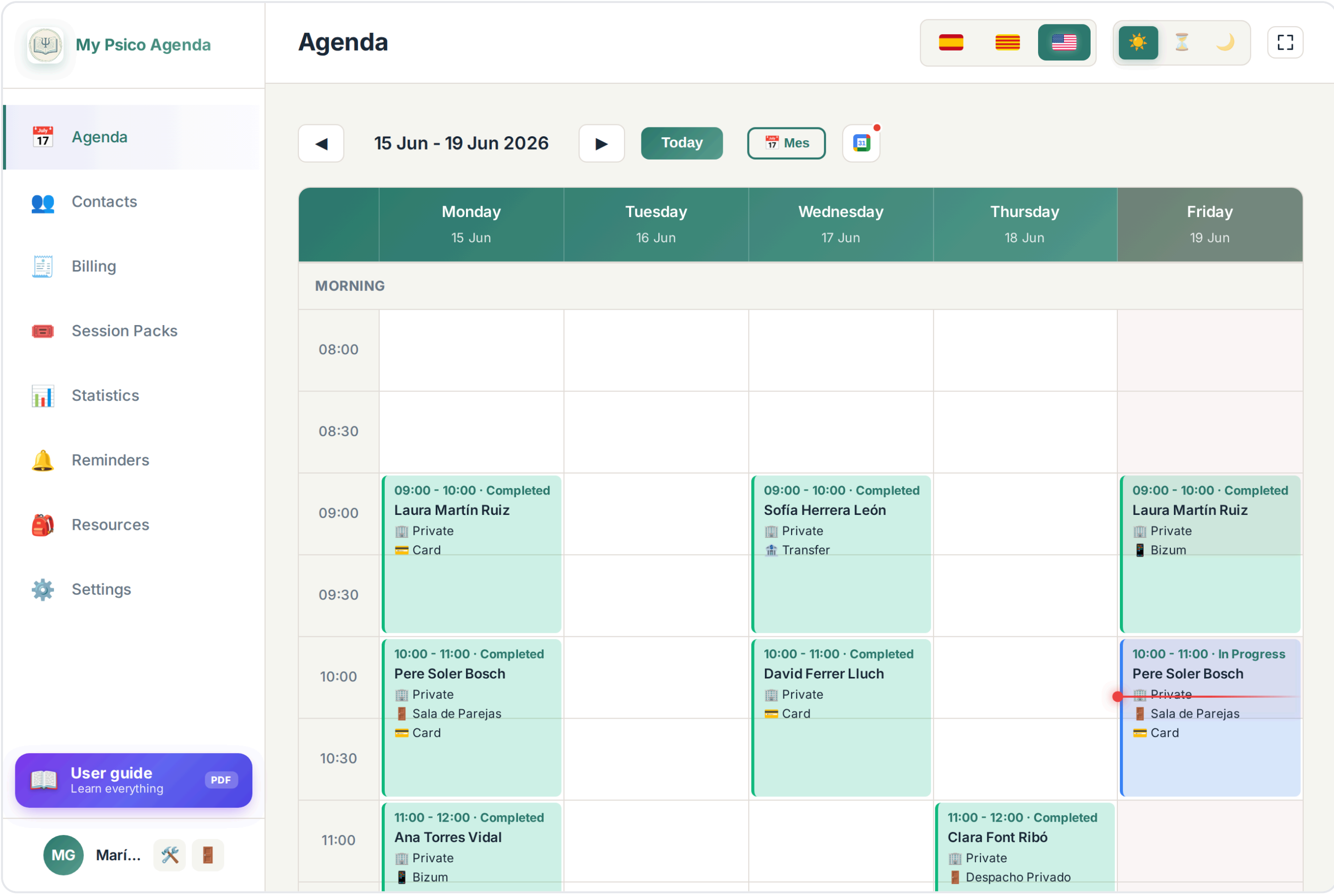


When finished you will see how many contacts and appointments were created, the duplicates skipped and any issues.

💡 **Tip:** When importing **appointments**, if the patient does not exist yet it is created automatically and linked to the appointment, without duplicating. Contacts with the same phone or email are **never** repeated, dates adapt to any format, and the file is deleted from the server when finished.

3 Welcome and main dashboard

When you log in you arrive at the **main dashboard**, the control center for your activity. From the **side menu** on the left you reach every section: Agenda, Contacts, Vouchers, Billing, Statistics, Reminders, Resources, Centers and Settings.



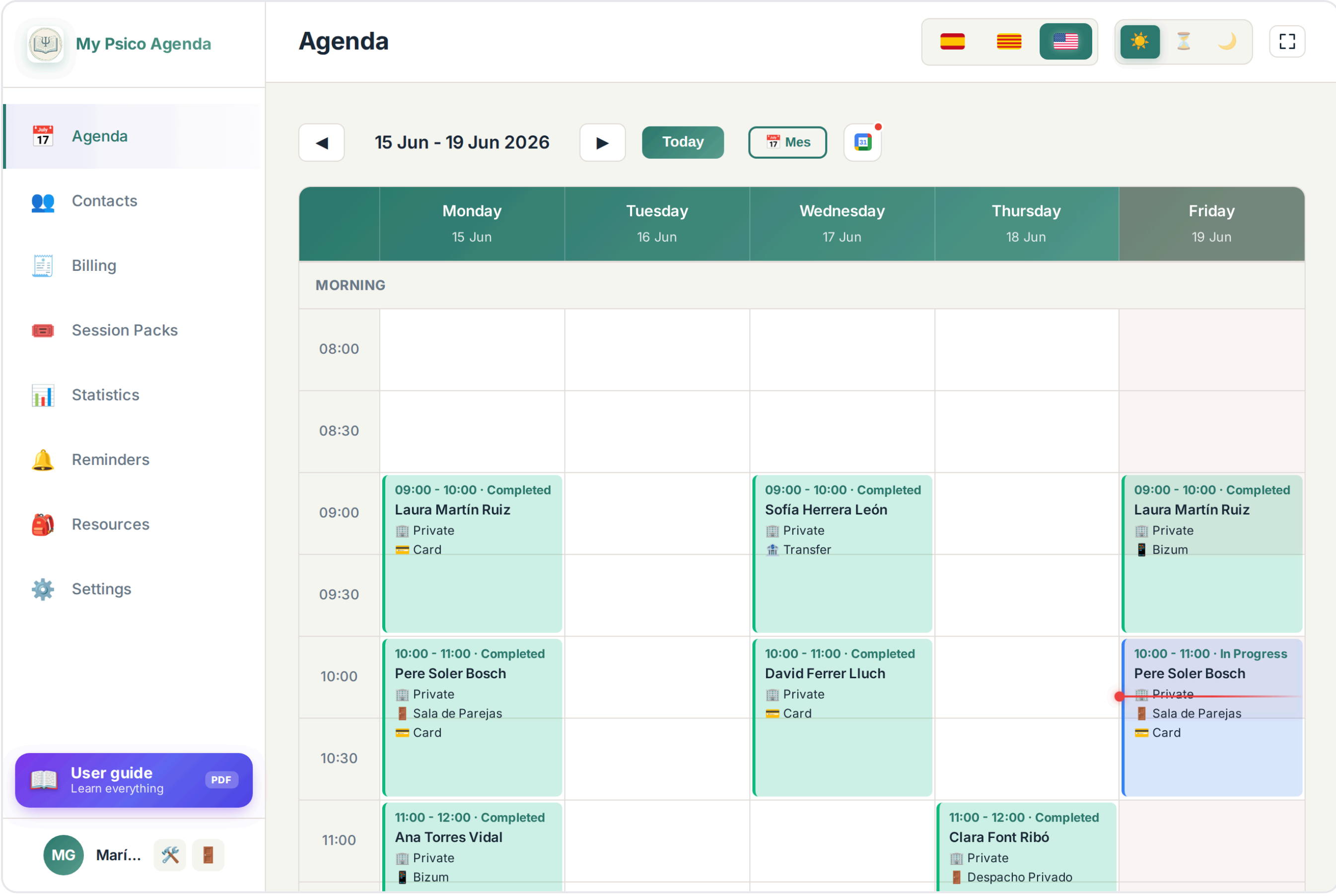
Overview of the dashboard with the side navigation menu.

1. Log in with your email and password on the sign-in screen.
2. Find the **side menu** and tap any section to open it.
3. On small screens, open the menu with the three-line icon (☰).
4. Tap your **name and avatar** at the bottom left to edit your profile (name and photo).

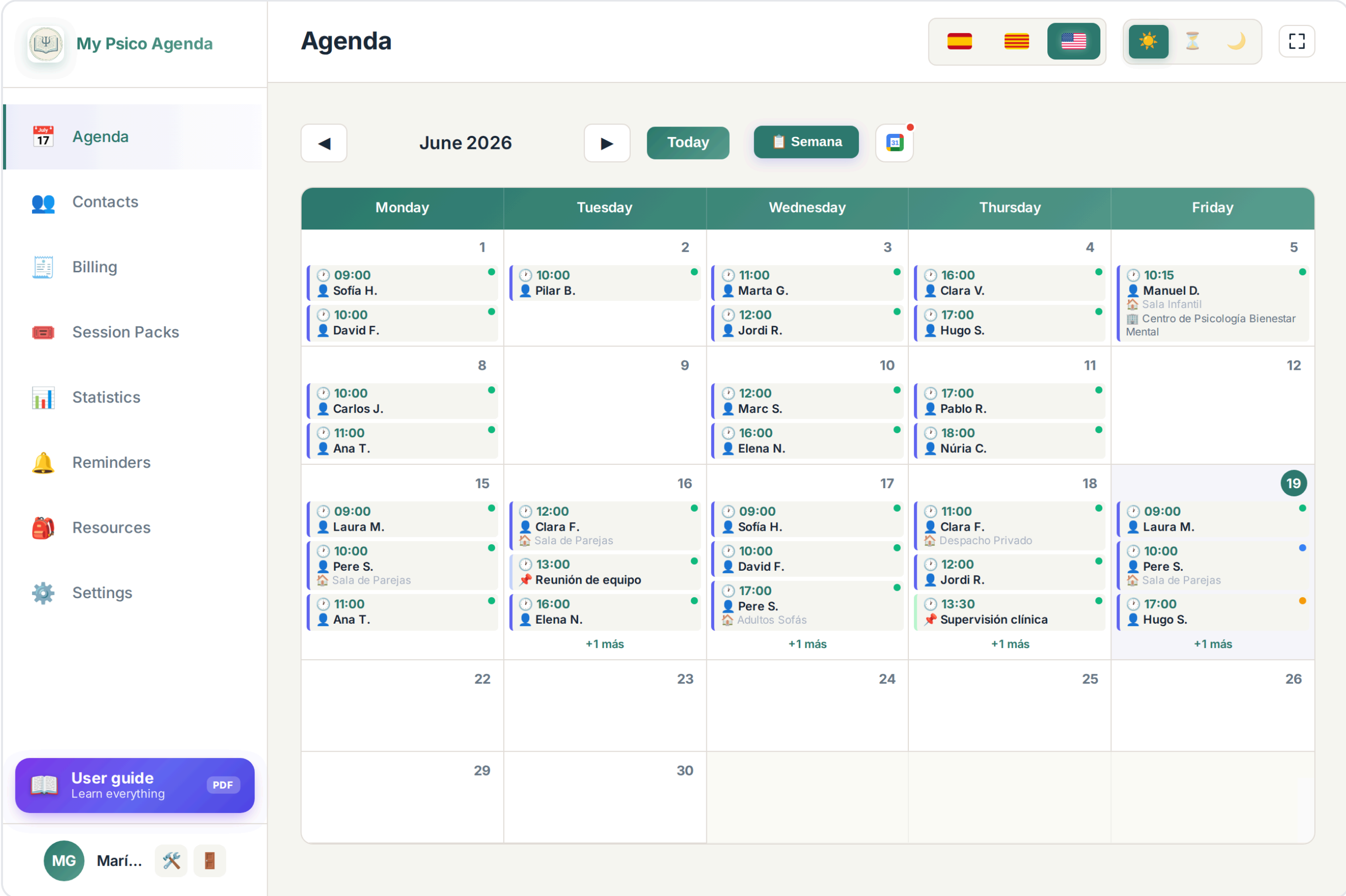
> 💡 **Tip:** Before you start, go to **Settings** to configure your billing details, your agenda and your security. That way everything will work correctly from the very first appointment.

4 Your agenda: week and month views

The **Agenda** is the heart of the app. You can view it in **week view** (each day's grid with *Morning* and *Afternoon* bands) or in **month view** (a full calendar for a panoramic overview).



Weekly view of the agenda with the Morning and Afternoon bands.



Monthly view for a panoramic overview of the month.

1. Tap the **Month** button to switch to the monthly view; tap it again to return to the weekly one.
2. Move between weeks or months with the ◀ and ▶ arrows.
3. Tap **Today** to jump straight back to the current day.

> 💡 **Tip:** Use the **month** view to plan and spot gaps at a glance, and the **week** view to manage the day-to-day in detail.

5 Creating and managing appointments

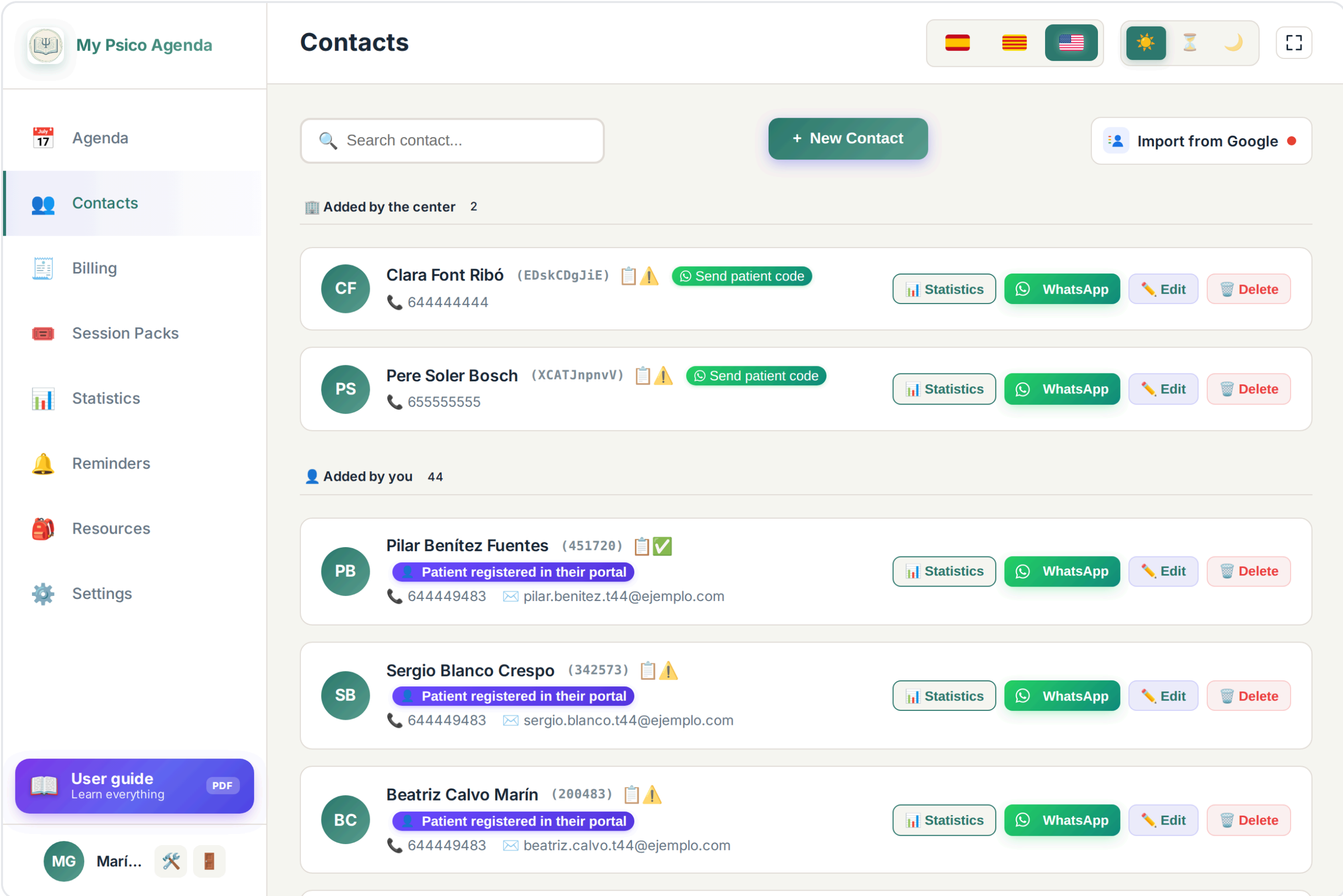
To create an appointment, tap a **free cell** in the grid. A dialog opens where you choose the type: **Therapy** (a session with a patient) or **Other** (a meeting, training or simply blocking off time). For a *Therapy* you set the patient, date, time, duration (30/45/60/90/120 min), center or room, approach (EMDR, CBT, etc.), price and payment method. For *Other* you fill in date, time, duration, the details (required) and a color.

1. Tap a **free cell** in the agenda at the desired time.
2. Select **Therapy** or **Other** as appropriate.
3. In Therapy, use the **patient search box** and fill in duration, approach, price (gross/net) and payment method (cash, card, Bizum or transfer).
4. To modify an appointment, **click on it** and save the changes (this is also how you reschedule, since there is no drag and drop).
5. To cancel, open the appointment and tap **Delete or Cancel**, stating the reason.

> 💡 **Tip:** There are no recurring appointments or drag and drop: to change an appointment's day or time, edit it and save the new date. Use the **Other** type to block off hours when you don't want to receive bookings.

6 Patients and contacts

In **Contacts** you find each patient's record. The **search box** ignores capital letters and accents, so just typing part of the name is enough. Each card offers quick actions: statistics 📊, WhatsApp, edit, delete and send the portal code.

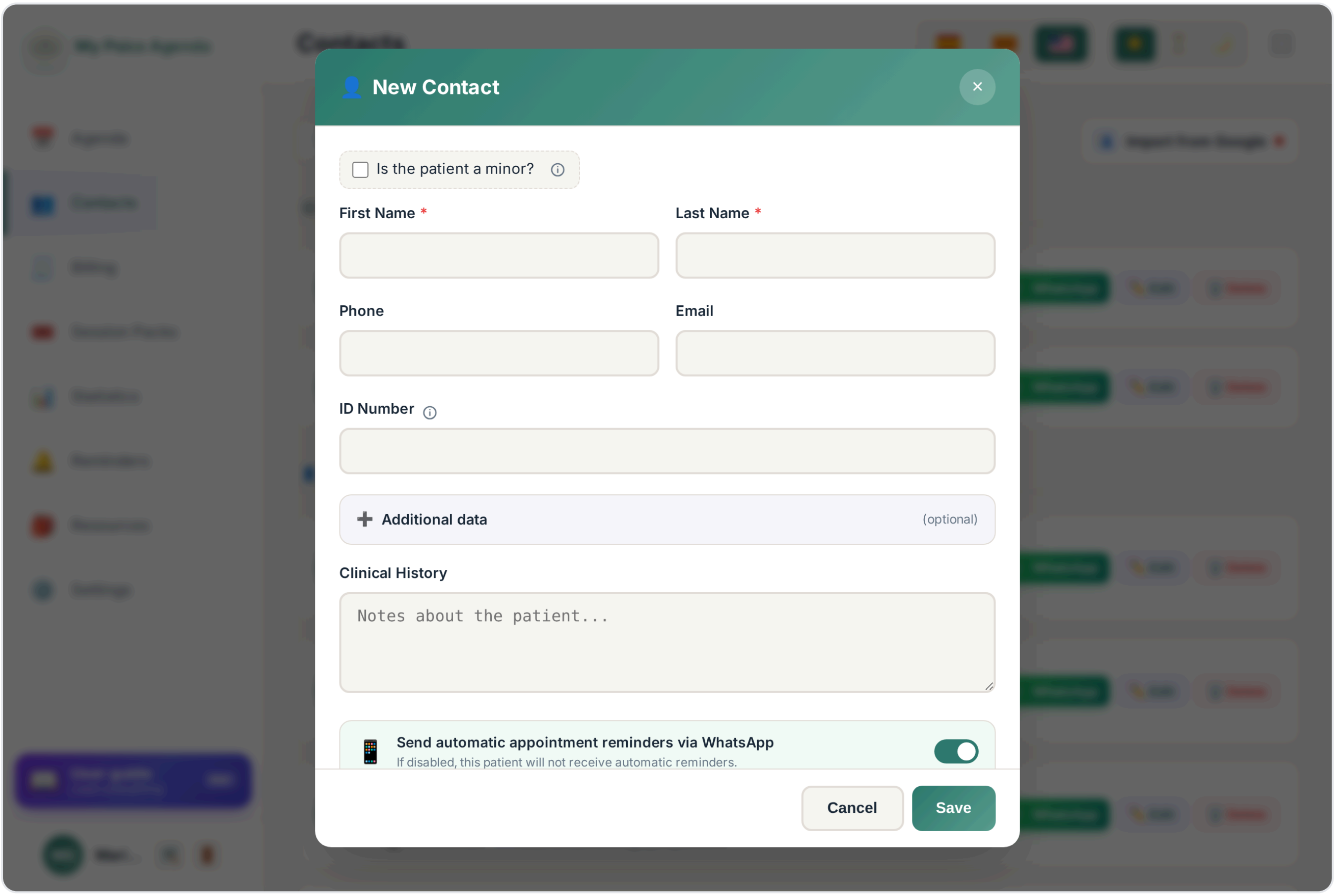


Patient list with a search box and quick actions on each card.

1. Type in the **search box** to filter the list instantly.
2. Tap the 📊 icon on a card to view that patient's **statistics**.
3. Use the **WhatsApp** button to message the patient directly.
4. Tap **send portal code** so the patient can access their personal area.

7 Adding a patient, minors and files

To register a patient tap **New Contact**. The **first name** and **surnames** are required; the **ID number** is needed if you are going to issue invoices. If the patient is a minor, switch on the **"is a minor"** toggle and the app will ask for the minor's name and the parent's details. You can also store the clinical history and attach the patient's files (by uploading them or using the camera, depending on your quota).



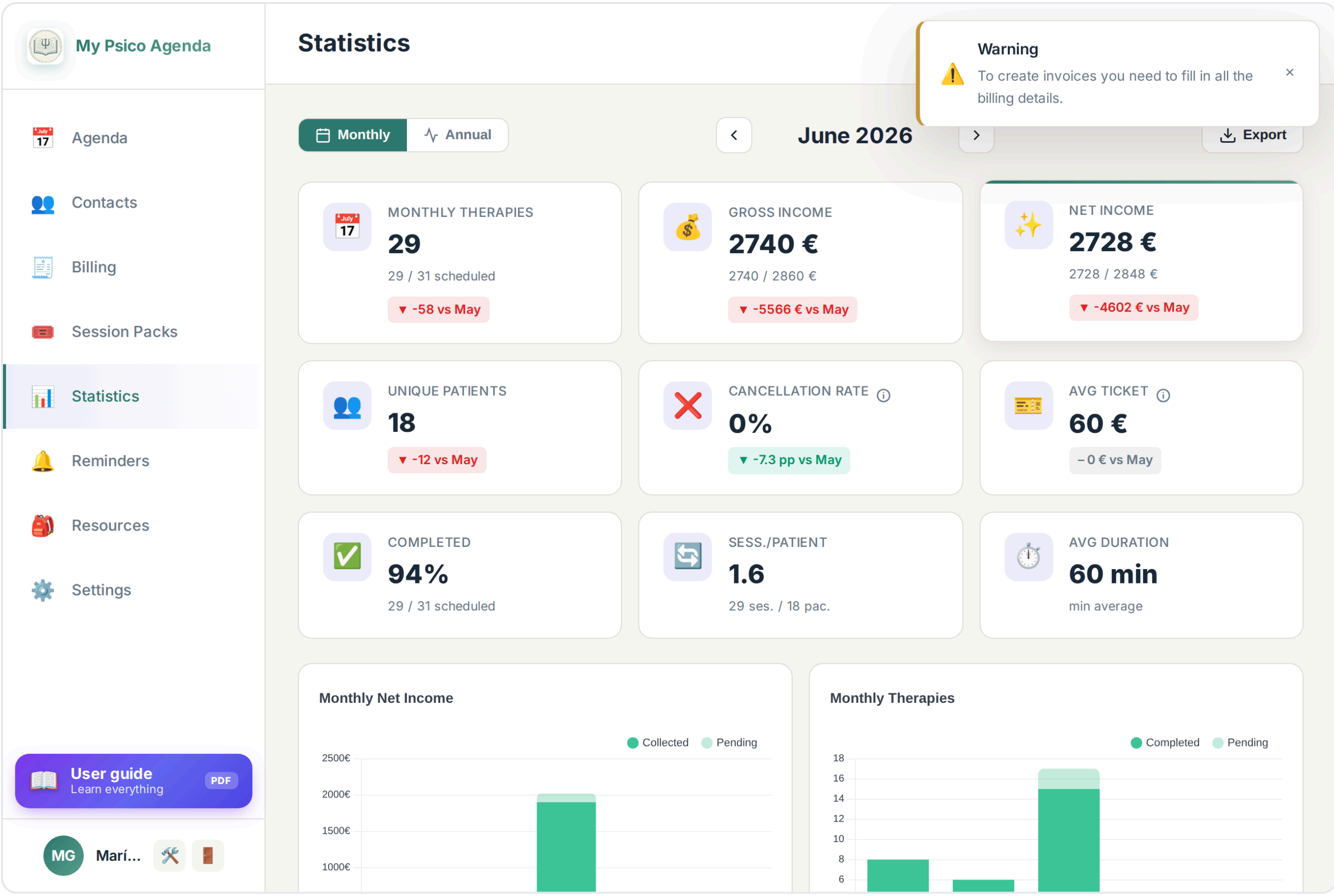
Form for adding a new patient.

1. Tap **New Contact** (or **Import from Google** if you already have them in your contacts).
2. Fill in **first name and surnames** and, if you are going to invoice, the **ID number**.
3. Switch on **"is a minor"** when applicable and add the parent's details.
4. Complete phone, email, additional data and the **clinical history**.
5. Attach the **patient's files** and enable WhatsApp reminders if you wish; save.

💡 **Tip:** Take care of the **ID number** and email from the start: these are the details the app reuses when generating invoices and sending portal access.

8 Statistics and reports

The **Statistics** section gives you a clear view of your activity: number of sessions, gross and net income, unique patients, cancellation rate, average ticket, sessions per patient and average duration, with charts and date filters.



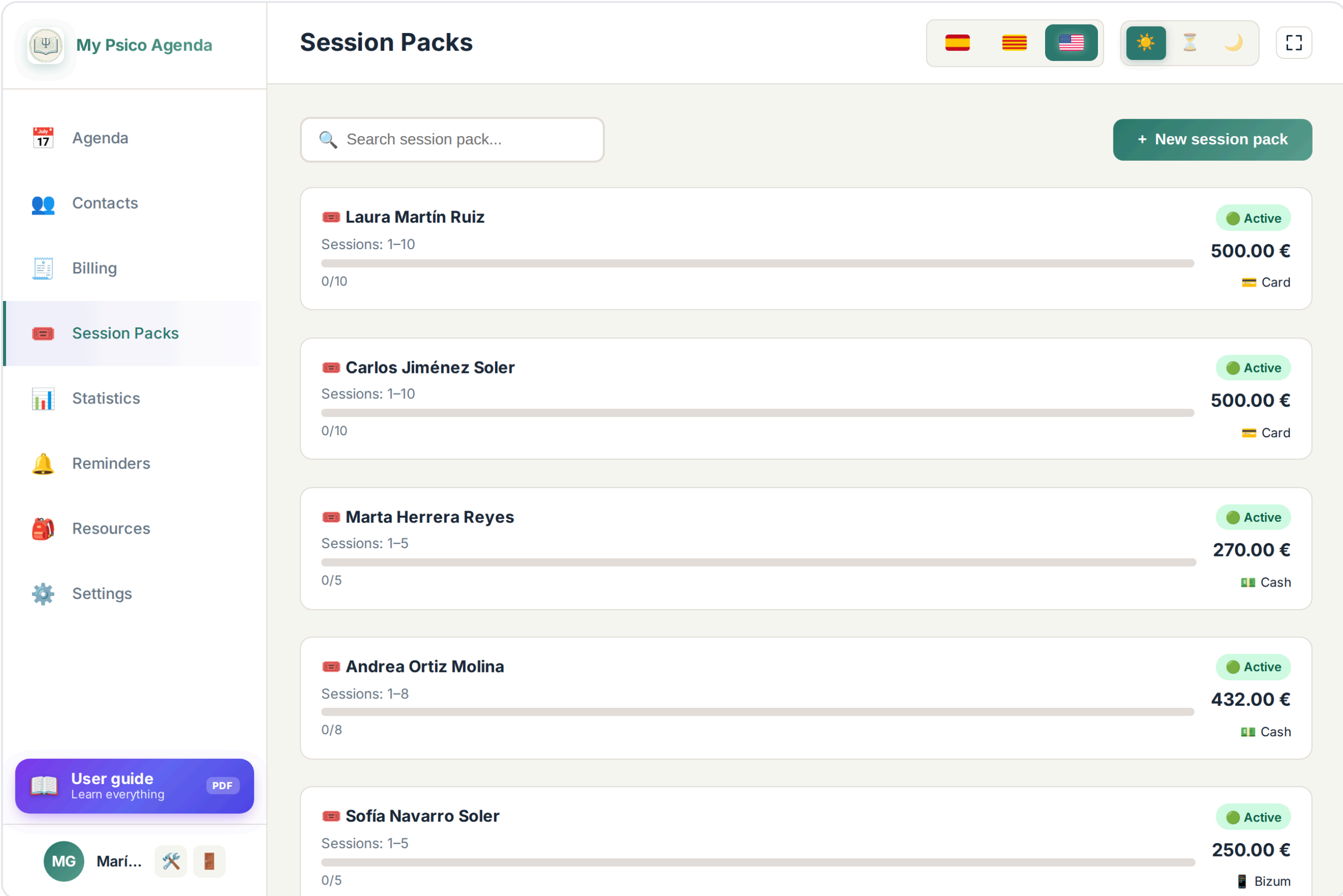
Statistics dashboard with KPIs and charts of your activity.

1. Open **Statistics** from the side menu to see your KPIs and charts.
2. Switch between **Monthly** and **Yearly** views depending on the period you want to analyse.
3. Press **Export** to download a PDF report with your indicators.
4. To see a specific patient's progress, tap the 📊 **Statistics** button on their card in the Contacts section.

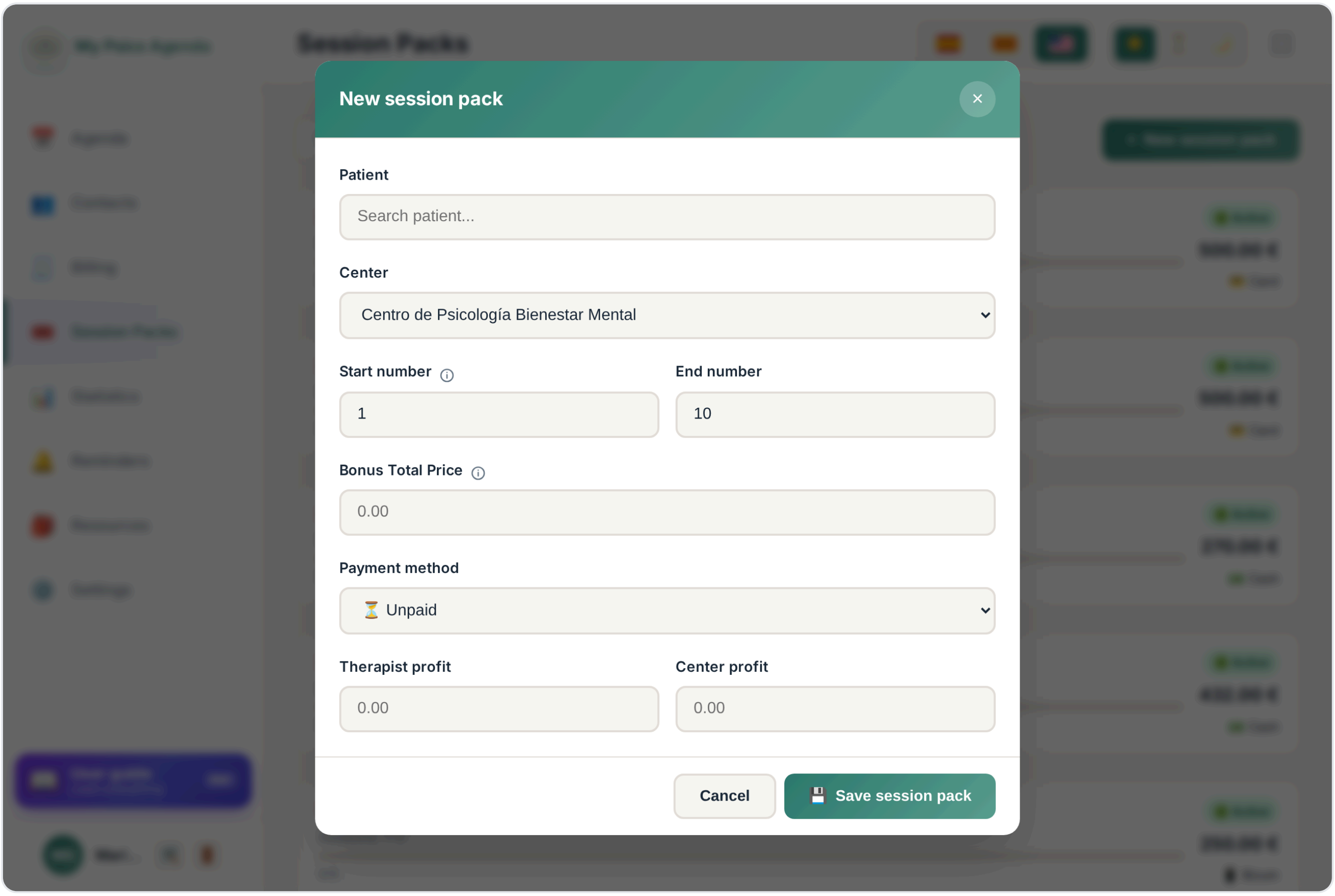
> 💡 **Tip:** Review your statistics every month: they help you spot cancellations, adjust fees and understand how your practice is doing.

9 Session vouchers

Vouchers are packs of sessions the patient pays for in advance. You define a range of sessions (start and end number), a **total price** and a payment method. From then on, **each appointment automatically deducts** one session from the voucher.



List of active session vouchers.

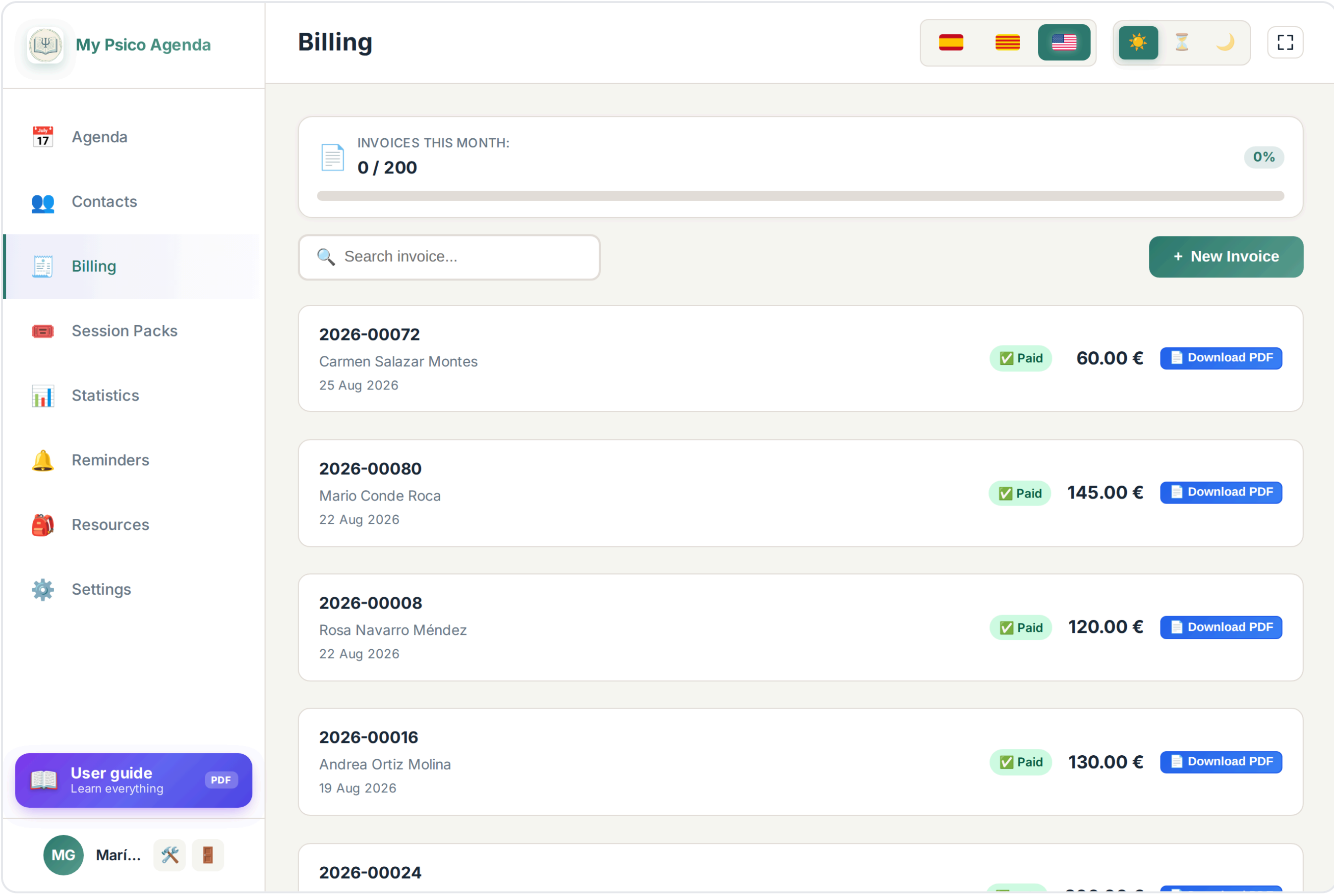


Form for creating a new voucher.

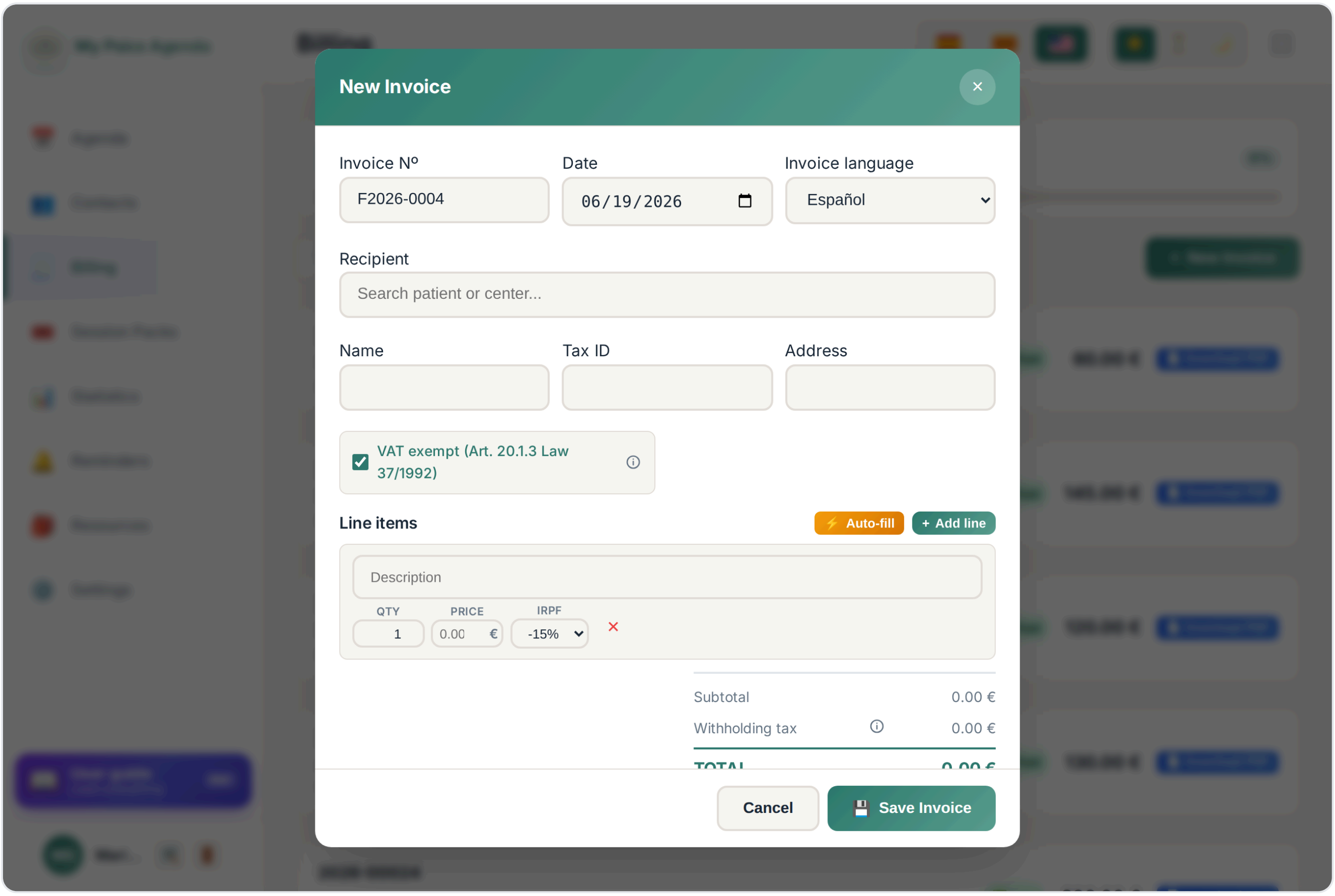
1. Go to **Vouchers** and tap the button to create a new one.
2. Select the **patient** and define the range of sessions (start–end).
3. Set the **total price** and the payment method; save the voucher.
4. Create appointments as usual: they will be **deducted from the voucher** as you carry them out.

10 Billing and Verifactu

In **Billing** you issue your invoices with **automatic numbering** (for example, series F2026-0001). You choose the recipient (a patient or a center), add the lines — which you can **auto-fill from the sessions** — and apply VAT and withholding tax. When you submit it to **Verifactu/AEAT**, the invoice is sealed with a QR code and the action is **irreversible**.



Billing section with the list of invoices.



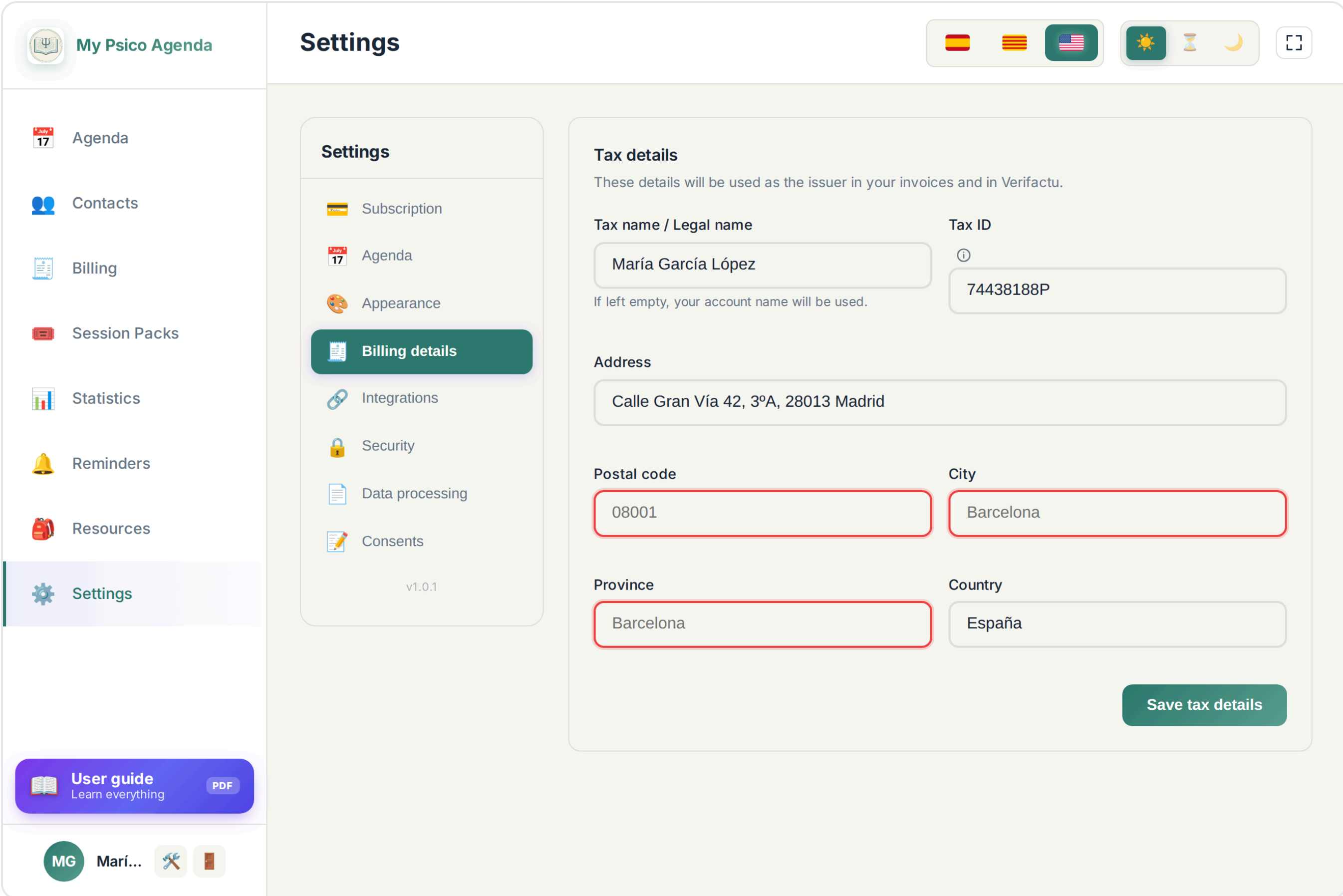
Form for creating a new invoice.

1. Open **Billing** and tap to create a new invoice.
2. Choose the **recipient** (patient or center).
3. Add the **lines**, auto-filling them from the sessions if you wish, and adjust **VAT/withholding**.
4. Check the total and, once it is correct, **submit to Verifactu/AEAT**.

> 💡 **Tip:** Always review the invoice **before** submitting it to Verifactu: once sealed with a QR code, the action is **irreversible** and you will not be able to edit it.

11 Issuer's billing details

Before issuing your first invoice, set up your **tax details** in **Settings · Billing details**: name or company name, tax ID, address and the rest of the information that will appear on every invoice. These details are applied automatically to all the documents you generate.



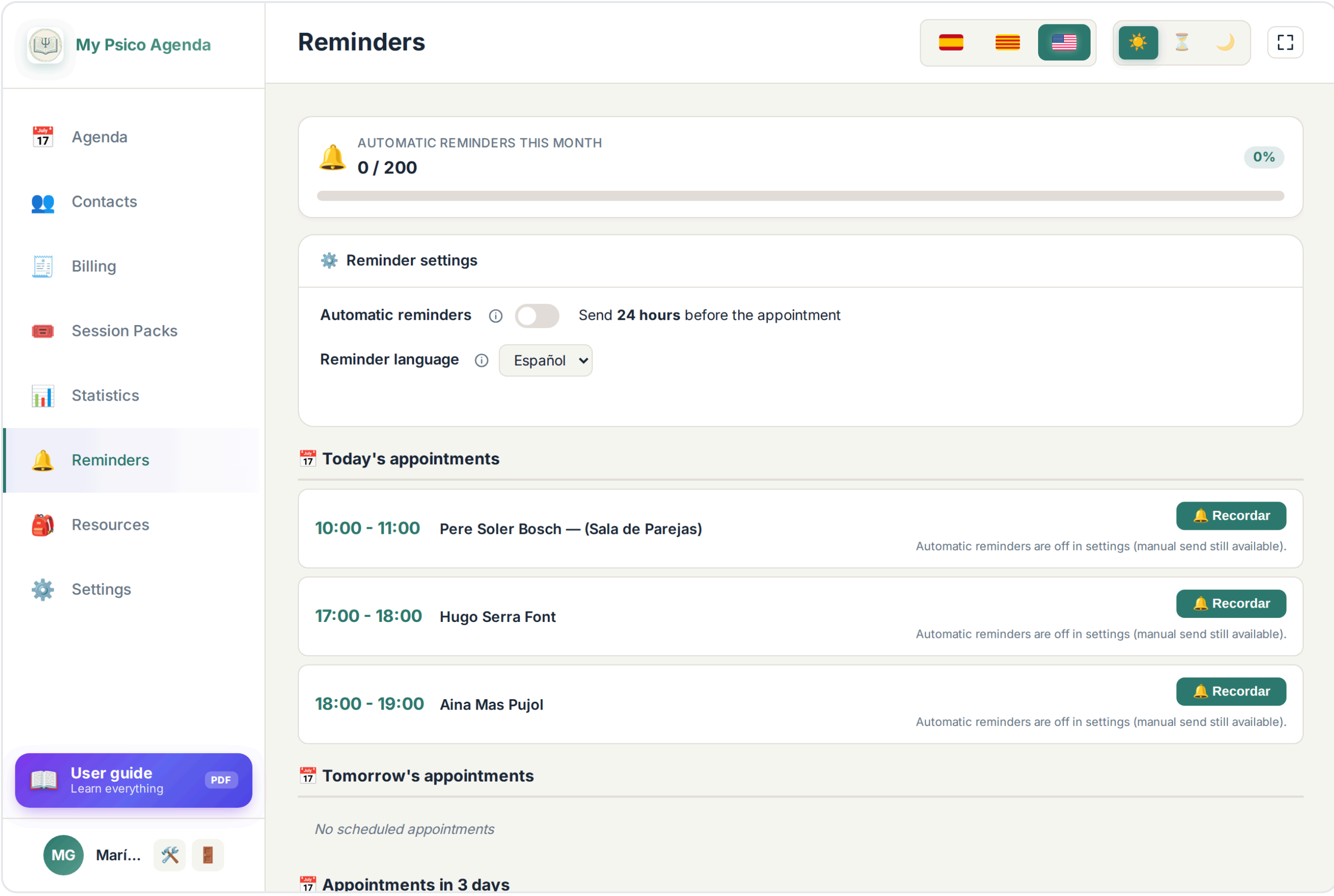
Settings · Issuer's billing details.

1. Go to **Settings** and open **Billing details**.
2. Enter your **name or company name** and your **tax ID**.
3. Add the **tax address** and the rest of the required details.
4. Save the changes so they appear on your upcoming invoices.

> 💡 **Tip:** Complete this section **before** issuing any invoice to Verifactu: the issuer's details cannot be changed once the invoice is sealed.

12 WhatsApp reminders

The app sends **automatic reminders 24 hours before** each appointment by **WhatsApp**. In the **Reminders** section they appear grouped by *Today*, *Tomorrow* and *3 days*, so you can keep track of everything going out. The reminder language is independent of your dashboard's language.



Reminders grouped by Today, Tomorrow and 3 days.

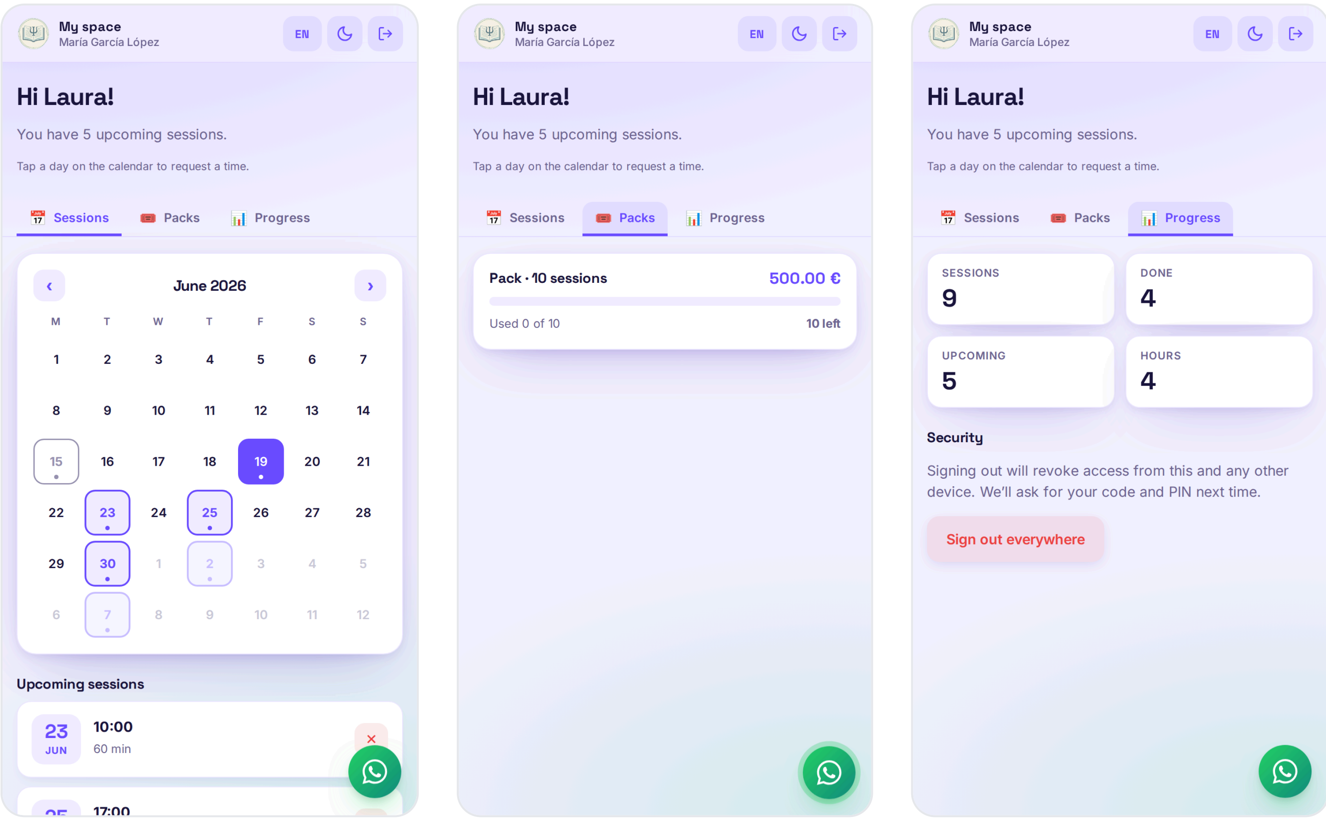
1. Open the **Reminders** section from the menu.
2. Check the messages grouped under **Today**, **Tomorrow** and **3 days**.
3. Make sure the patient has a **phone** and reminders enabled in their record.

💡 **Tip:** You can set the **reminder language** per patient to write to each person in their own language, without affecting the language of your own dashboard.

13 Patient portal and online booking

Each patient has their own **online space**, which they enter with a **personal code** and a **PIN**. From there they see their upcoming sessions, their progress and can **book an appointment** themselves.

You send them the code via **WhatsApp** from their card in Contacts. The appointments they request appear in your calendar as **pending slots** that you just confirm.



The patient's space on their phone: upcoming sessions, packs and progress.

1. In **Contacts**, tap the **WhatsApp** button on the patient card to send them their access code.
2. The patient enters their space, creates a **PIN** and is ready to use it.
3. They will see their **upcoming sessions**, their **packs** and their **progress** (Appointments, Packs and Progress tabs).
4. To book, the patient taps a **free day** on the calendar and picks an available time.
5. Their request reaches you as a **pending slot** in your calendar; once you save it, the appointment is confirmed.

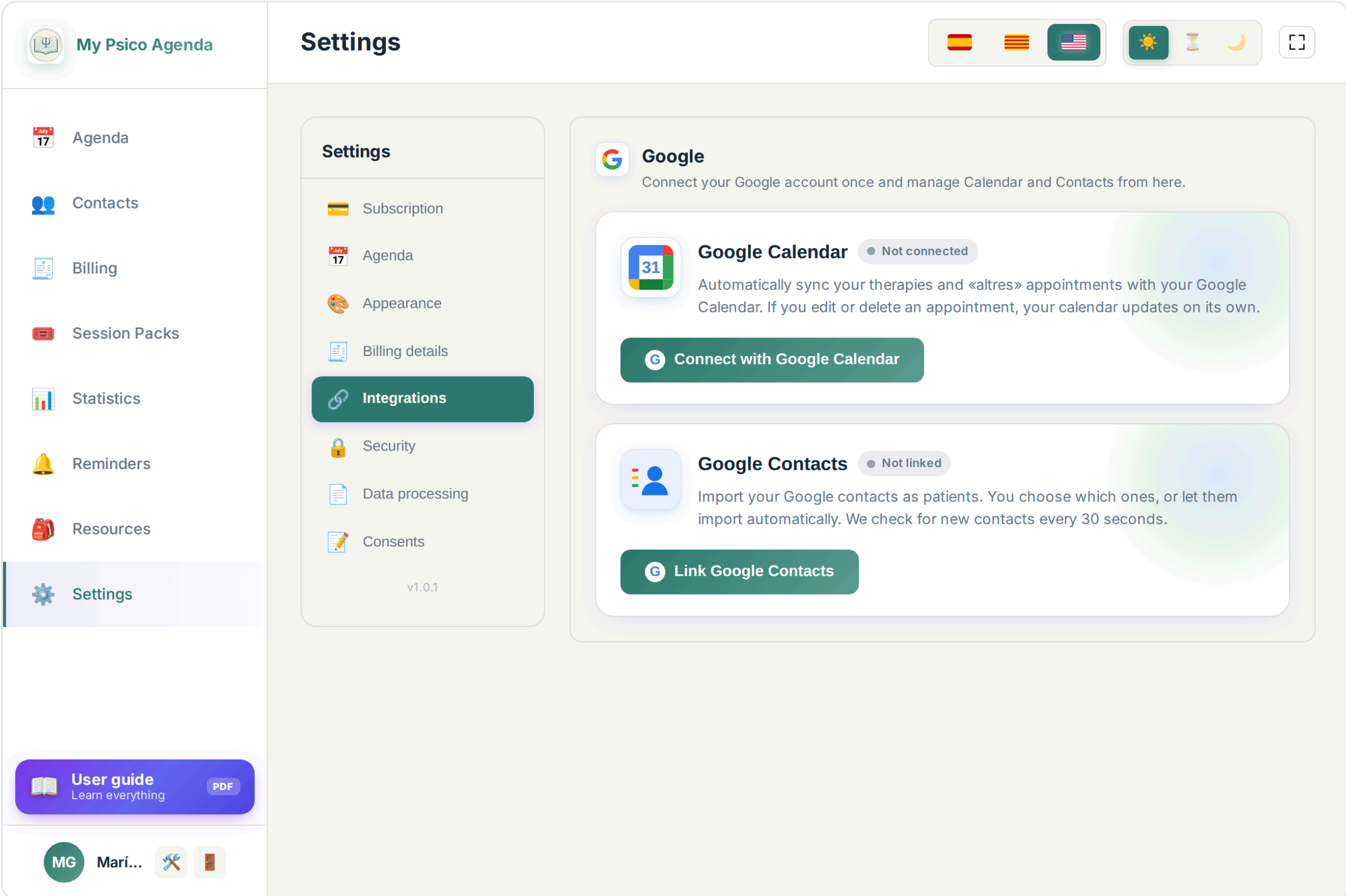
> 💡 **Tip:** The free times the patient sees come from your own calendar: if you block an hour with an «Other» appointment, it stops being offered.

14 Google Calendar & Contacts sync

With a **single Google connection** you enable two syncs: **Google Calendar** and **Google Contacts**. Both are managed from **Settings · Integrations**.

Google Calendar: your appointments (therapy and «Other» type) are pushed to your Google calendar; if you edit, move or cancel an appointment, the event updates automatically. You can force a sync with **Sync now**.

Google Contacts: import your Google account contacts as patients. Choose **Manual** mode (review and pick who to import) or **Automatic** (new contacts come in by themselves). You can also import from the Contacts section itself with «Import from Google».



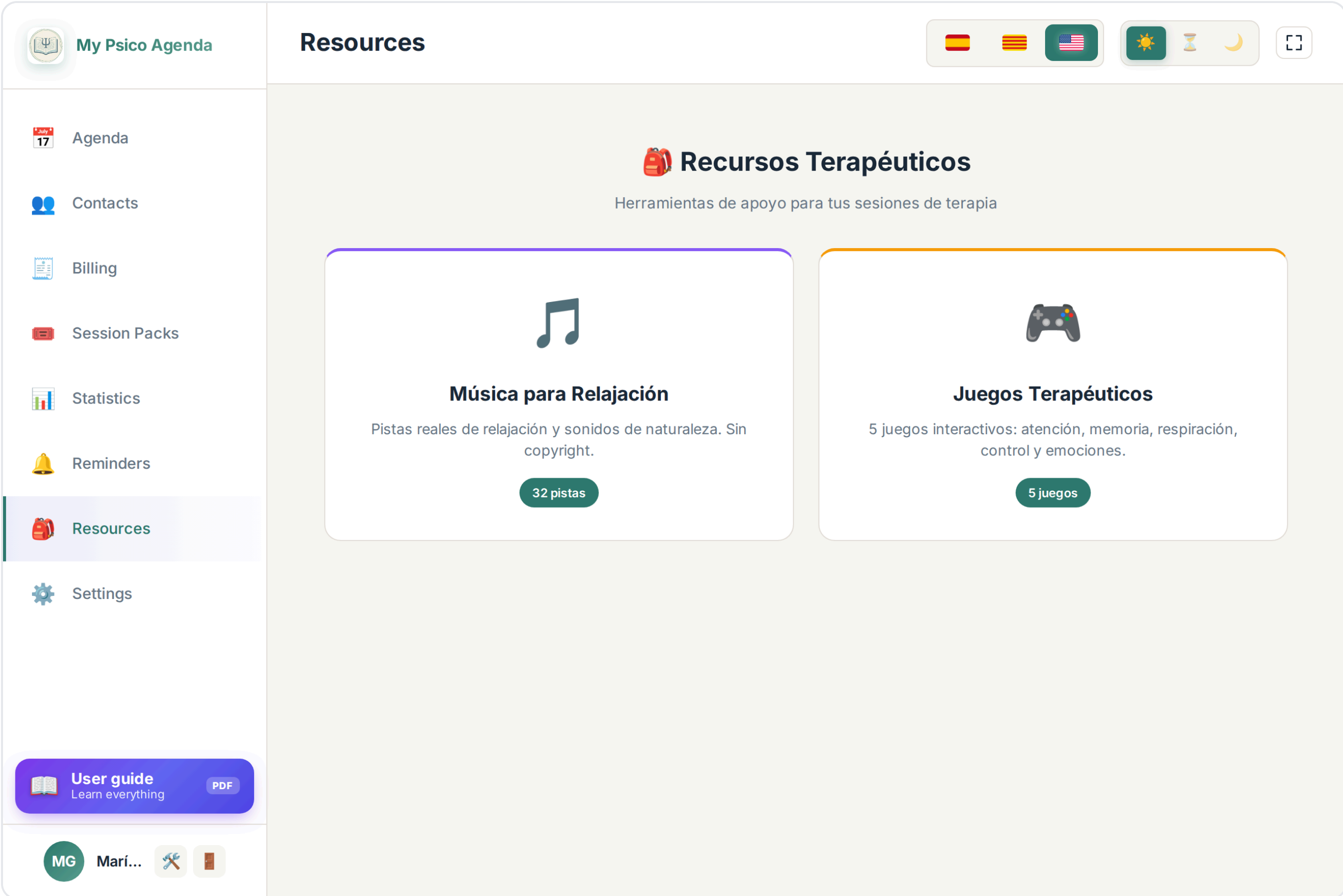
Settings · Integrations: single Google connection for Calendar and Contacts.

1. Go to **Settings · Integrations** and tap **Connect with Google**.
2. Authorise access to your **Calendar** and **Contacts** on the Google screen.
3. On the **Google Calendar** card, tap **Sync now** to push your appointments.
4. On the **Google Contacts** card, choose **Manual** or **Automatic** mode.
5. If you use Manual mode, tap **Review and import** and pick the contacts you want.

💡 **Tip:** You can **disconnect Google** anytime from the same screen; your data in the app is kept.

15 Resources: music and therapeutic games

The **Resources** section (available on the Senior and Center Super plans) offers you support material for your sessions: **relaxation music** with 32 tracks and **5 therapeutic games** — Sequences, Guided Breathing, Memory Pairs, Stroop Challenge and Recognize the Emotion.



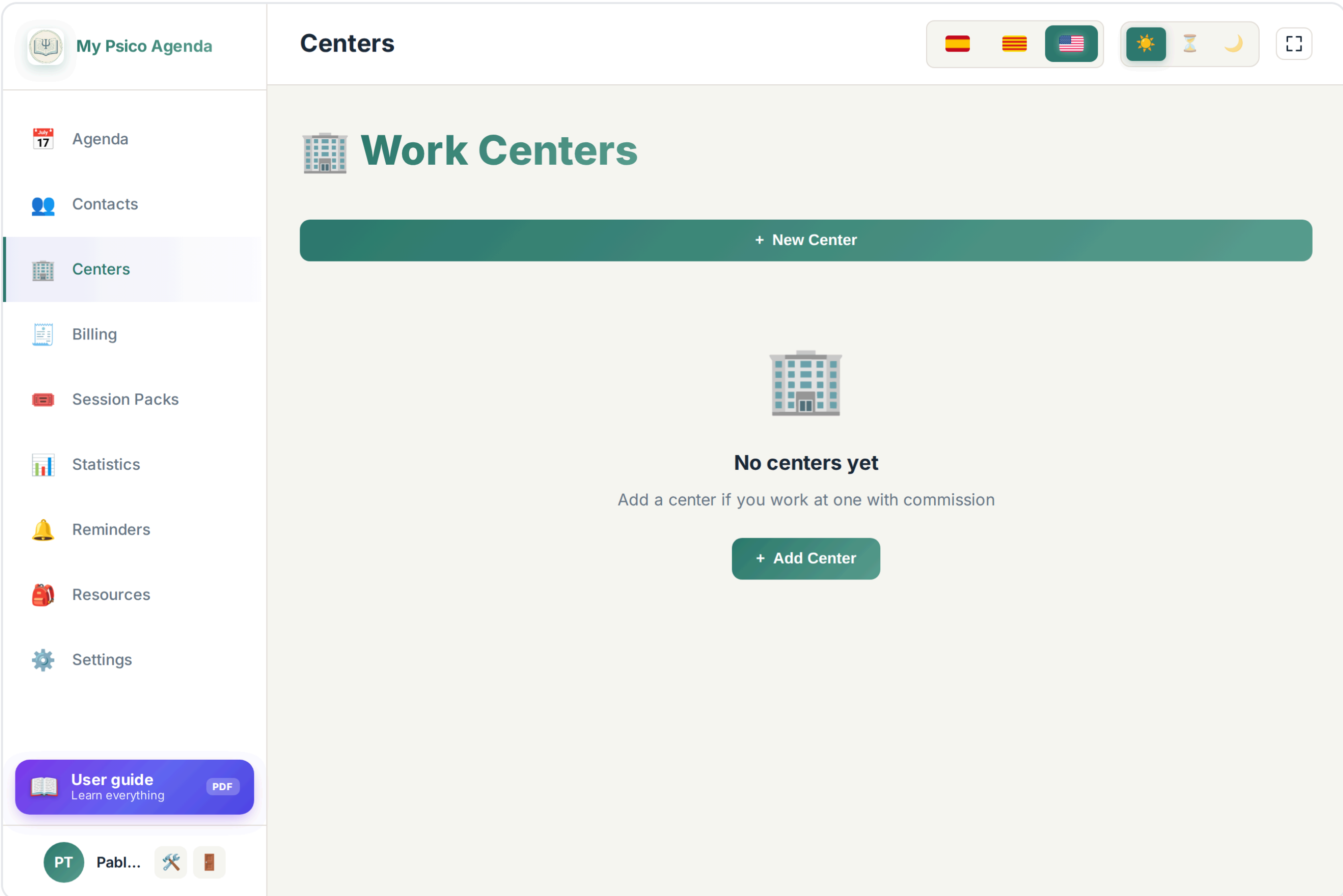
Resources: relaxation music and therapeutic games.

1. Open **Resources** in the side menu.
2. Select one of the **32 music tracks** to set the mood for the session.
3. Pick one of the **5 games** according to the therapeutic goal you are aiming for.

> 💡 **Tip:** Combine the relaxation music with a game such as **Guided Breathing** to open or close the session in a calm way.

16 Centers and rooms

If you work as a self-employed therapist across different spaces, in the **Centers** section you can register the **external centers** where you see patients, set their **commission** and define each one's **rooms**. Then, when creating a Therapy appointment, you will be able to assign it the corresponding center and room.



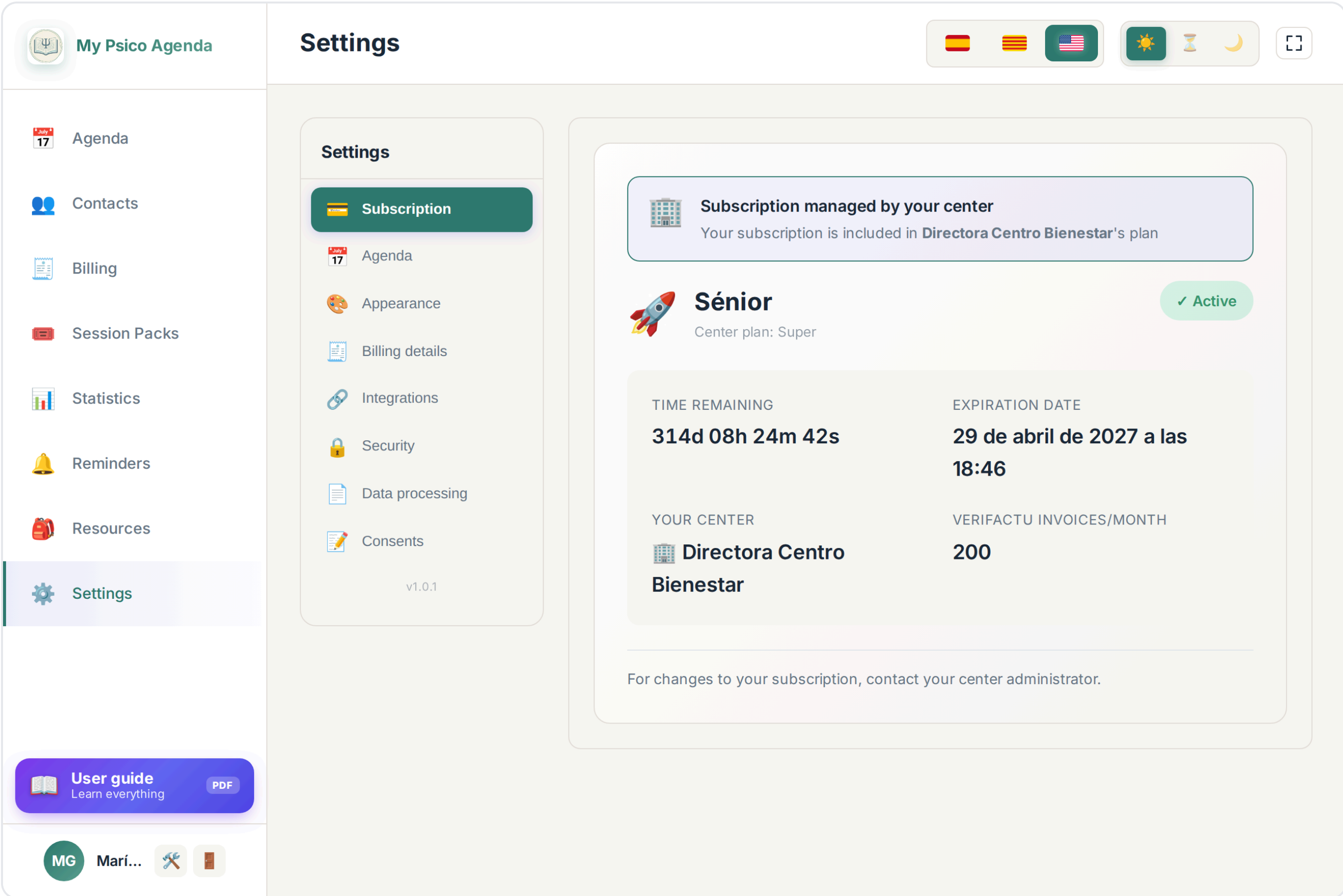
Centers section with their rooms and commissions.

1. Go to **Centers** and tap to add a new center.
2. Enter the center's name and its **commission**.
3. Define the **rooms** available at that center.
4. When creating a Therapy appointment, select the **center and room** in its dialog.

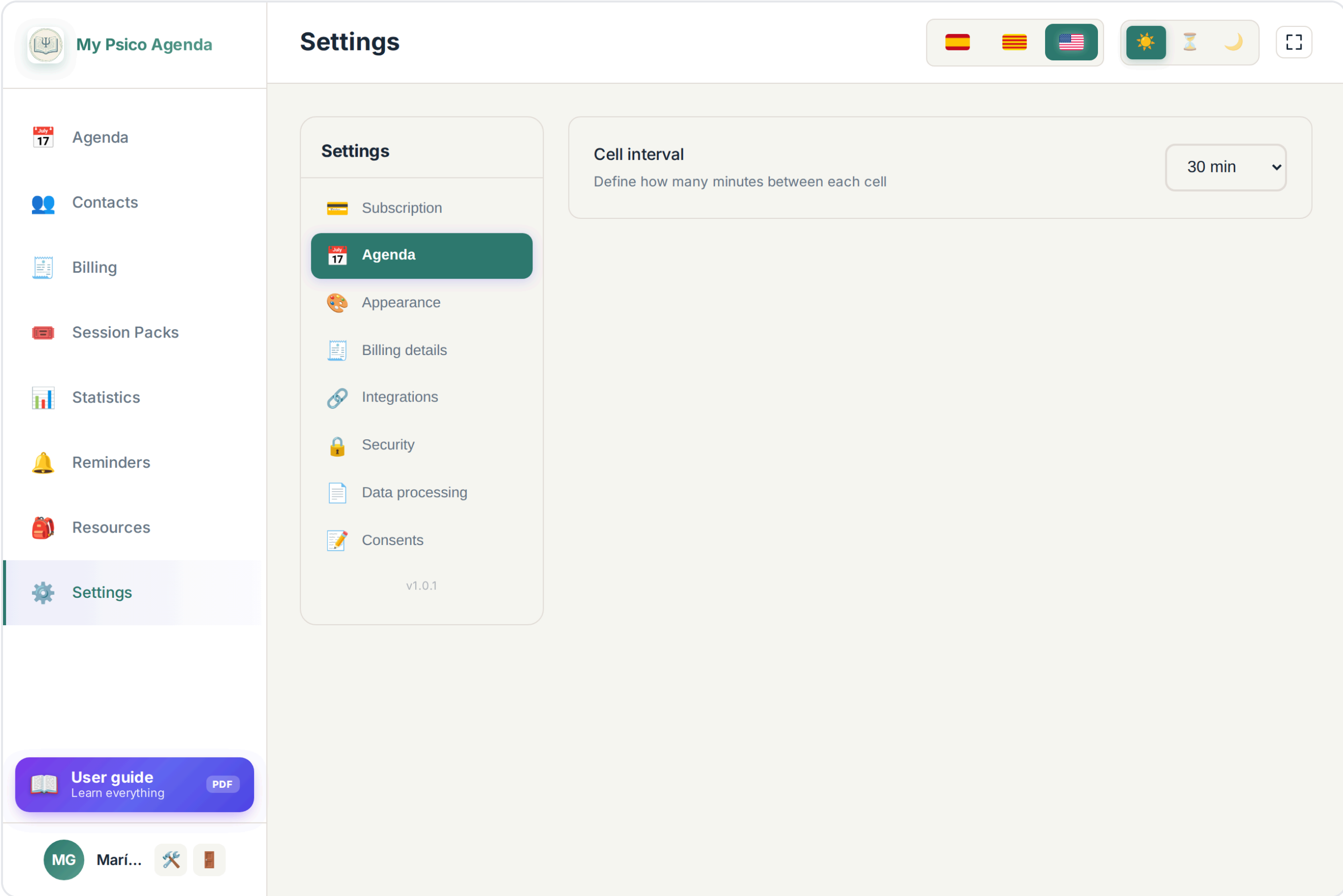
> 💡 **Tip:** Setting each center's **commission** lets your statistics and income reflect your real net earnings at every space.

17 Settings: subscription, agenda, appearance and security

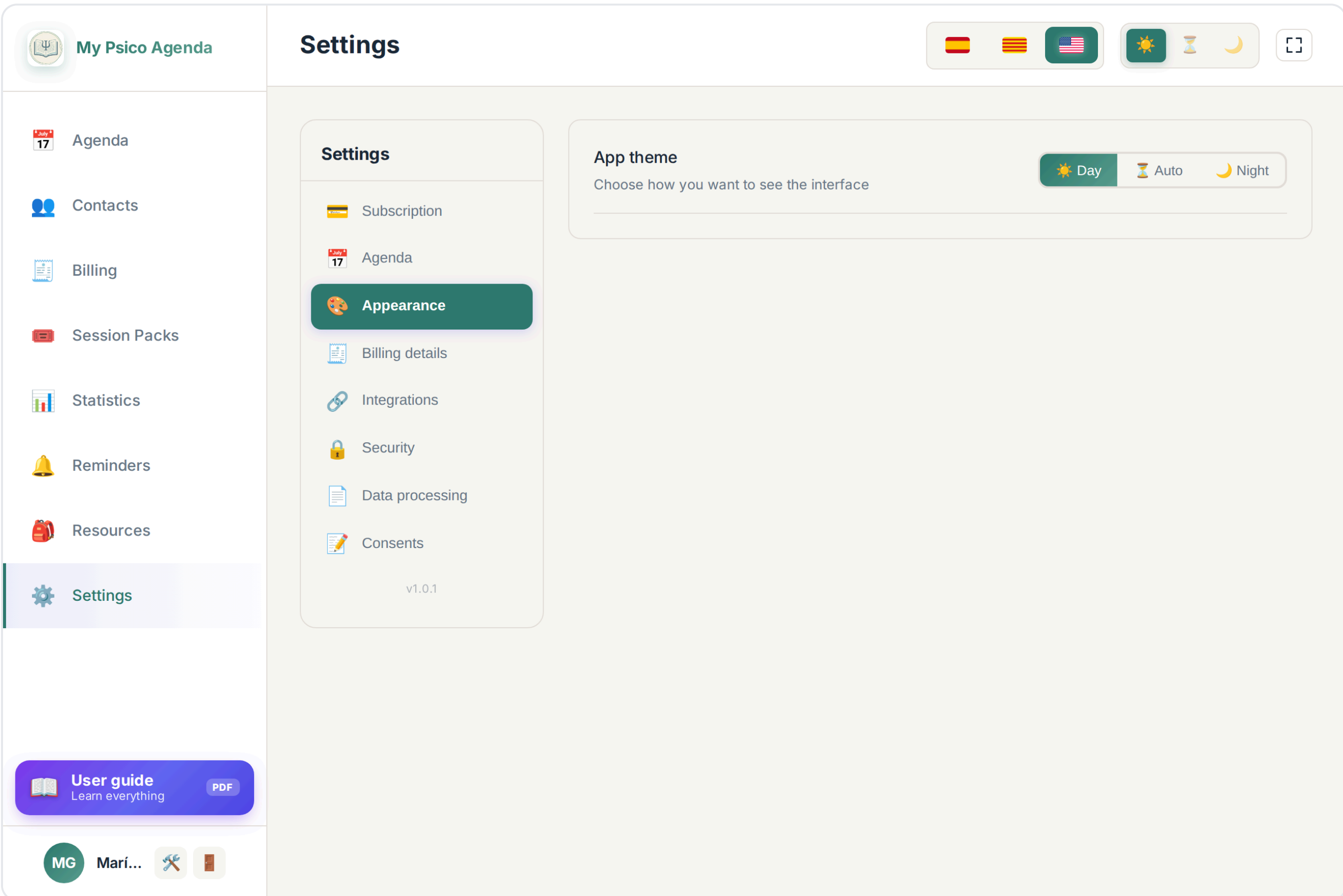
From **Settings** you tailor the app to your needs. In **Subscription** you check and change your plan; in **Agenda** you set the grid interval (15, 30 or 60 minutes); in **Appearance** you choose the theme (Day, Auto or Night); and in **Security** you protect your account.



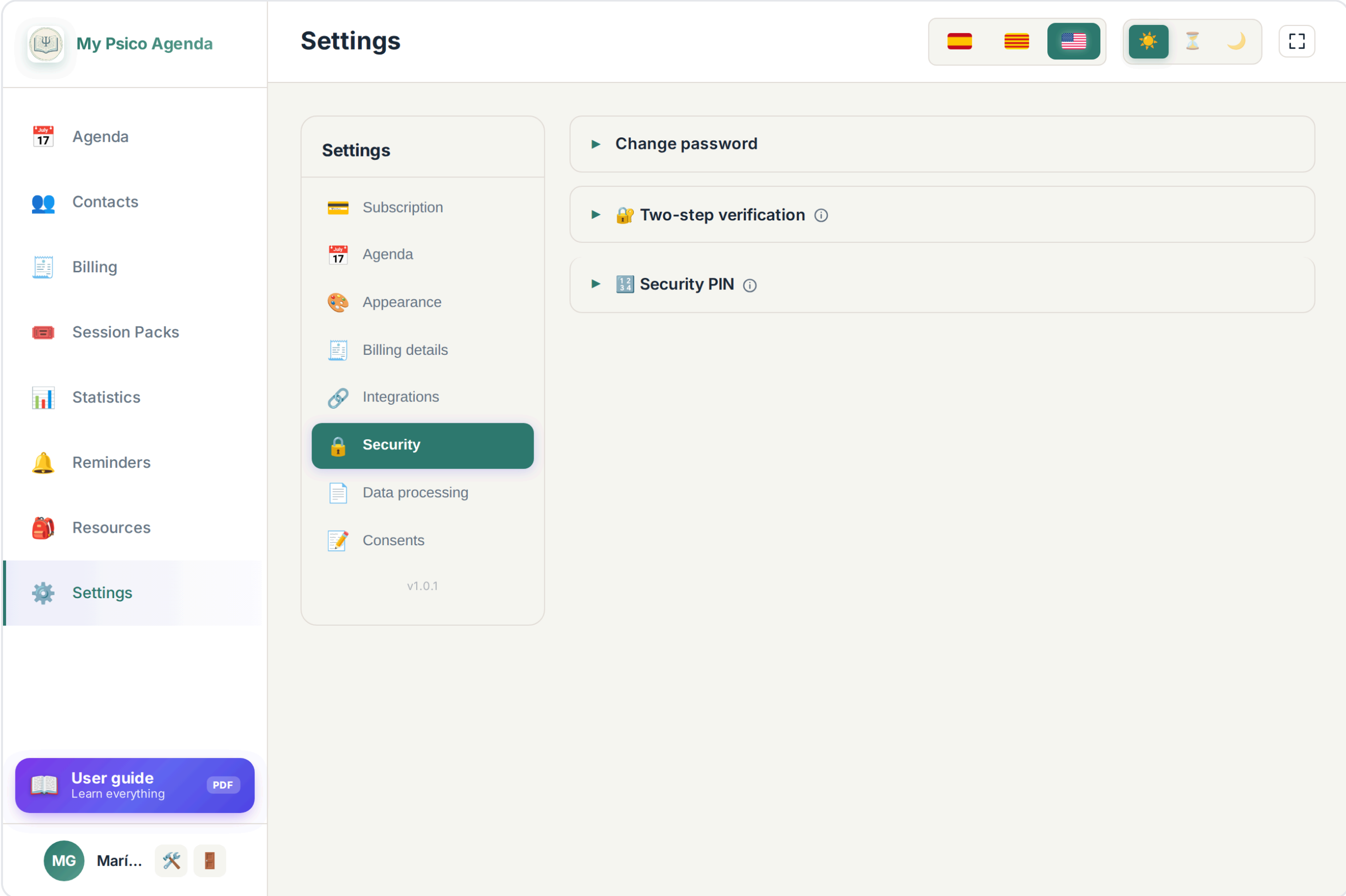
Settings · Subscription: check and change your plan.



Settings · Agenda: grid interval (15/30/60 min).



Settings · Appearance: Day, Auto or Night theme.



Settings · Security: password, 2FA and PIN.

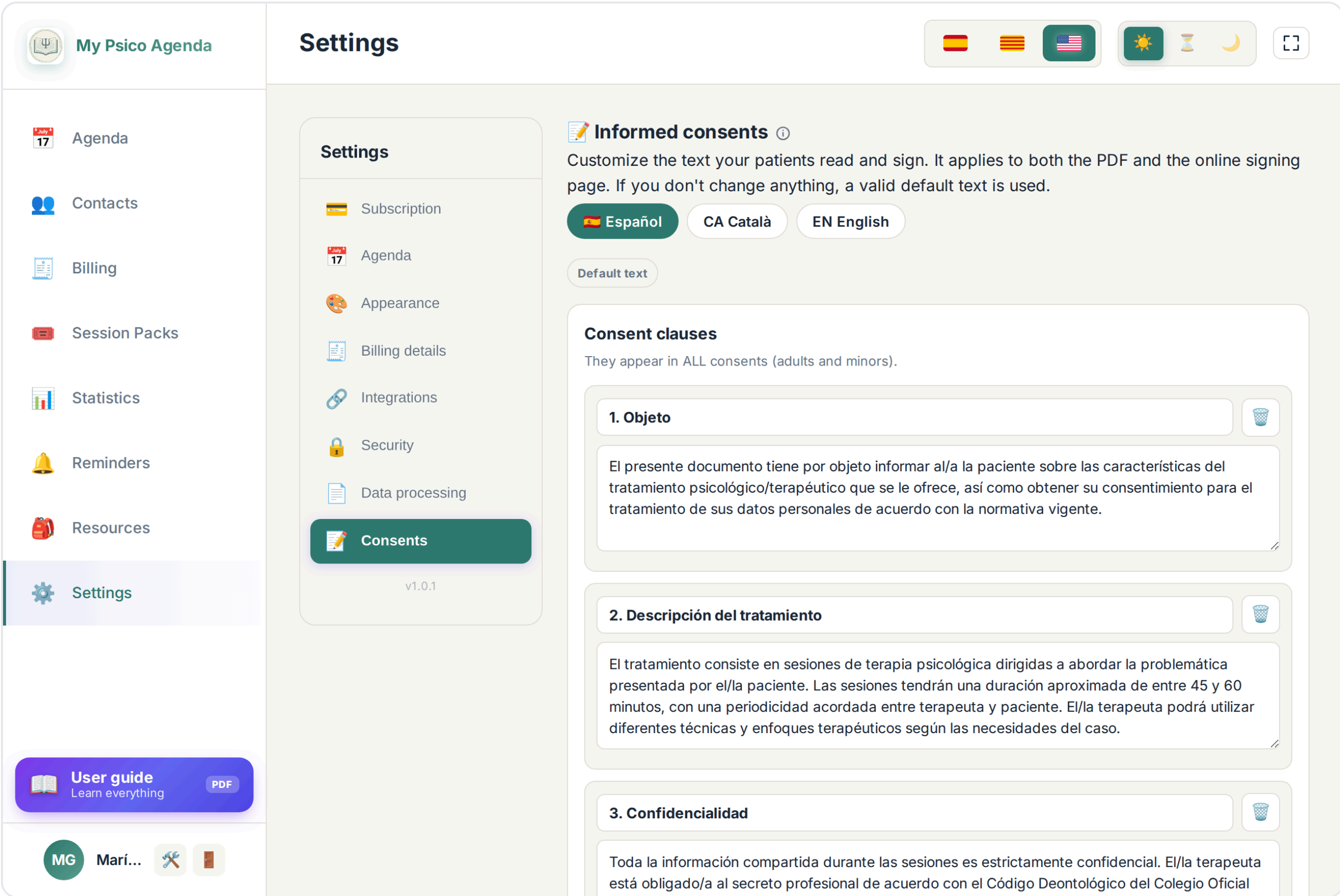
1. In **Subscription**, review your current plan and change it if you need to.
2. In **Agenda**, choose the grid interval: **15, 30 or 60 minutes**.
3. In **Appearance**, select the **Day, Auto or Night** theme.
4. In **Security**, change your password and enable **email 2FA** and the **4-digit PIN**.

> 💡 **Tip:** For security, enable **email 2FA** and a **4-digit PIN**: they protect your patients' clinical data even if someone gains access to your device.

18 Informed consent

Informed consent is essential before starting therapy. My Psico Agenda lets you **customise the consent text** and collect the patient's signature, in person or remotely, for both **adults** and **minors**.

From **Settings · Consents** you edit the template text in each language (🇪🇸 Spanish, Català and English). That text is what appears on the PDF and on the online signing page.



Consent template editor, with a tab per language.

1. Go to **Settings · Consents** and edit the template text; switch language with the 🇪🇸 / CA / EN tabs.
2. Save your changes (or restore the default text) for each language.
3. To sign with a patient, open their card and tap **Add consent**.
4. Choose the type: **adult** or **minor**, and fill in the patient's or legal guardian's details.
5. Collect the **on-screen signature** in session, or tap **send link** so the patient can sign online from their phone.

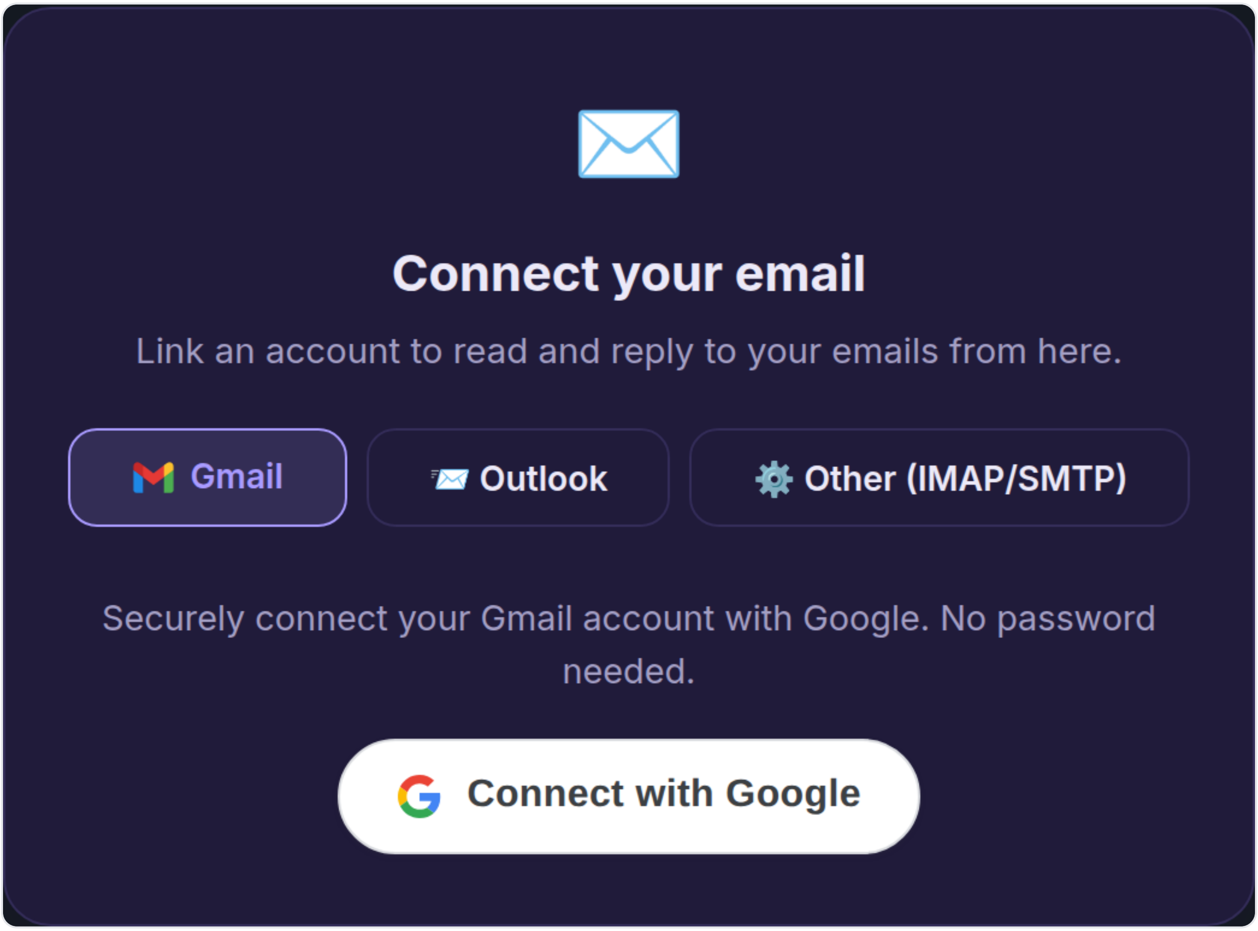
💡 **Tip:** Always store the signed consent before the first session: it is saved as a PDF in the patient's file.

@ Email inbox

From **Inbox** (in the menu, under Contacts) you handle your practice’s email without leaving the app: connect your **Gmail** or any **IMAP/SMTP** account and read, search and reply to your emails, with folders, attachments, embedded images and a signature.

1. Open **Inbox** in the side menu (under Contacts).
2. Click **Continue with Google** for Gmail, or choose “Other (IMAP/SMTP)”, enter your server and use **Test connection**.
3. Read and **reply** to your emails; attach files, download attachments and delete messages with confirmation.
4. Set your **signature** (with an image) and the sender name from the ⋮ menu. The inbox **syncs** automatically every minute.

> **Tip:** You can also connect Gmail from **Settings → Integrations**. With Gmail you don’t need a password: it connects securely with Google.



The Inbox: connect your Gmail or an IMAP/SMTP account.