

# Welcome to frontmy!

Here you will find everything about frontmy.com

[frontmy.com](http://frontmy.com) is a web application, completely on-line, without equipment requirements or installations of any kind, accessible from any device with Internet access.

General features:

- Appointment Schedule
- Patients
- Professionals
- Services
- Offices
- Medical Insurance and Cash Flows
- Tracking of Patients
- Reminder message via e-mail or SMS
- Statistics dashboard

What does [frontmy.com](http://frontmy.com) do for the patient?

- It allows them to make an appointment on-line from any device, without the need to call. Only for those professionals who want it.
- It sends an e-mail automatically 24 hours before the appointment.
- It sends a reminder message to the cellphone: 1, 2, 3, 4, or 24 before, according to the setting mode at the time of making the appointment (optional service with additional charges by SMS)

What does [frontmy.com](http://frontmy.com) do for the assistants?

- It allows to manage professionals' schedules under one application.
- It offers all the necessary tools to help the patient make an appointment over the phone, check previous appointments, current accounts, tracking, etc.
- It allows to track patients, keeping a phone call record.
- It manages the cash flows of each professional and also globally.
- It allows to manage patients' current accounts, not only cash ones but also from the medical insurance.

- It manages daily tasks, marking them as done or saving them.
- It generates the report of the appointment book by professional so that it could be sent by e-mail or printed.

## What does [frontmy.com](https://frontmy.com) do for the professionals?

- It manages their own schedules, makes appointments and all their assistants' tasks.
- It makes appointments in other professionals' schedules who belong to their working team.
- It allows to manage their dates and inactive hours in which, for any reason, they will not meet a patient. These dates and times will not be available for making appointments.
- It manages a grid with weekdays, starting and finishing time of the working day, and starting and finishing time of breaks; besides, it times the length of the appointment.
- It manages the services provided and the length of the appointment for this service in particular.
- It visualizes the statistics dashboard which displays performance and quality indicators.

## What does [frontmy.com](https://frontmy.com) do for the supervisors?

- It manages every Group office creating resident offices in every country of the world.
- It checks every office's schedule, with a simple change of office, without leaving or getting into it again.
- Besides, it fulfills all the application's task.
- It visualizes the global statistics dashboard, or the board of a specific office, in which performance and quality indicators are displayed.

## Frontmy Structure

Frontmy presents a screen layout made up of three main areas; a top bar, the central section and a side menu.

Throughout this documentation, we will make reference to these areas and the elements in each of them.

In the top bar we can find icons with a particular function.

In the central section, in which most of the tasks inside the application are performed, we can find elements such as tabs, grids, forms, icons, etc.

In the side menu, we can find only the available options that will access the central section.

## Definitions

**Tab:** Subdivision of a screen that shows more information in the same space. For example, the schedule screen is divided into three tabs:

- Morning Schedule
- Afternoon Schedule
- Appointments
- Tracking

At the same time, in the same screen, when changing tabs, we will see the morning or afternoon schedules, we can make a new appointment or track patients.

**Grid:** It is a list in sheet format, with rows and lines for every register and columns for every datum of that row or line. For example, in the appointment grid, every row is an appointment and every column is a datum of that appointment, such as the time, name of the patient, service, name of the professional, etc.

**Form:** It is a data collection that must be filled in when uploading or modifying registers. For example, the form for loading patient data, has name and last name, ID, date of birth, etc. Besides, every form has a bottom to finish the procedure; these could be OK, Cancel Close, etc.

## FAQs

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## How do I recover my password if I forgot it? [index](#)

In the main page of Frontmy, where we are asked the e-mail address and password to access the application, under the password field, we can access to Forgot your password? This will show us a form requesting the registration e-mail address, and we will receive an e-mail to this account with an access to recover our password.

## How do I change my password? [index](#)

In the side menu, which is opened with the left bottom in the upper bar, we click on the user name under the header screen menu. A sub menu will be displayed with two options; the first one allows us to change the password. Here we will see a form in which we are asked to enter the current password, the new password and to repeat it; then we click on the **green** OK bottom.

The second option logs out inside the application taking us back to the main page, frontmy.com

## How do I load a new patient? [index](#)

To load your first patient, we must go to the appointment tab, and next to the patient selector we click on the **green** bottom with the + symbol and we access the registration form for a new patient. Inside the form we have a few fields required to load the new patient. Then you can complete or correct data by clicking on the **blue** bottom with the pencil icon.

**Additional service:** The Frontmy team can import patients from any other software you are using. To do this, we must access the PC with the installed software and make an analysis to check data and the feasibility of importing them to Frontmy.

To start this process, you must contact us via e-mail to [soporte@frontmy.com](mailto:soporte@frontmy.com) or by telephone or Whatsapp to +54 9 3585065662 to speak to Daniel Rivarola or to +54 9 358 4 387365 to speak to Mariano Forrellad.

## How do I cancel a patient? [index](#)

As a matter of security and tracking, frontmy does not allow to delete a Patient permanently, we can only cancel them so that they disappear in the searches. In order to cancel them, we must choose the option Tables in the side menu, select the Patients table, and with the **blue** Filter bottom, we access a form with different fields to filter registers from the patients table; in the Text field we type the patient's last name, then we click on the **blue** Filter bottom and this will show us the patients with that last name. With the **blue** bottoms with the symbols < and > from the light **blue** bar we can browse the registers found until we find the patients we are looking for. After that, we can see the field of the main form called Cancel; if we mark this field, we will cancel the

patient. In order to complete the operation, we must click on OK and the robot will show a caption indicating a successful modification.

In order to check if the patient has been properly canceled, we can access the appointments tab and look for the patient, who should not appear as available.

To understand this process better, we suggest you to see:

[How does the option side menu tables work?](#)

## How do I load a new professional? [index](#)

To load a new professional, we must go to the appointment tab, and next to the professional selector we click on the **green** bottom with the + symbol and we access the registration form for a new professional. Inside the form, we find two tabs; one with the title Main Data in which there a few required fields

to load a professional, and the other with the title Schedule, in which we find the days and schedule matrix in which the professional works.

In this grid we can see the weekdays presented as columns, and as rows, the starting and finishing times of the working day, starting and finishing times of breaks and the consultation length in minutes.

The consultation length in minutes will be used in this application to make a grid of the professional available hours for appointments. For example, a length of 5 minutes, with a starting time a 8 a.m., will make a grid with the following timetables: 8:00, 8:05, 8:10, 8:15 and so on.

Then you can complete or correct data by clicking on the **blue** bottom with the pencil icon.

## How do I load a new service? [index](#)

To load a new service, we must go to the appointment tab, and next to the service selector we click on the **green** bottom with the + symbol and we access the registration form for a new service.

In this form we will find the name of the service and its length in minutes.

This length must be multiple of the consultation length, set in the professional schedules so that the service can take one, two or more appointments in the schedule grid.

Besides, we will find the selector Type of Service that will determine how the services are assigned to each appointment:

- **Single:** It is assigned, for the second appointment, verification of medical examinations and beginning of the plan.
- **Initial:** It is assigned in the first appointment by showing the start of a new patient.

- **Frequent:** It is assigned from the third appointment onwards.
- **Reactivation:** It is assigned when there has been 180 days or more since the last consultation.

## How do I load an appointment? [index](#)

In the upper area of the central section and visible to all the schedule, we can find the date in **red** with two bottoms on the left and on the right that allow to navigate to each day forward and backward. If we click on the arrow, a calendar will be displayed in order to access directly to a particular date.

To the left of the date, we can see four circular bottoms; the first one is **light blue** with the word TODAY and three white ones with the numbers +7, +14 and +21. When clicking on these bottoms we are taken to TODAY'S date to 7, 14 or 21 days from today

With these bottoms we can choose the date we will make the appointment.

In the central section, we direct ourselves to the Appointments tab and we will find a form with three fields: patient, professional and service.

The first field, patient, allows us to look for it only by typing the name, ID or file. If we wish to load it again, we click on the **green** bottom with the + symbol; if, once we have found it, we want to change some of its data, we click on the **blue** bottom with the pencil icon; and if we wish to clean what we have written on the searching desk, we click on the **red** bottom with the x symbol.

The above explained about the patient field, is repeated for the professional and service fields.

Once we have chosen or loaded a patient, we choose or load the professional and we choose or load the service. With these three data, we are ready to choose the time in the grid that appears bellow. You can see that the schedule grid is divided into two tabs; morning and afternoon schedules.

If we pay attention to the schedule grid, we can see timetables in **light blue** that are ready to be used and in **red**, those that are already taken; there you can see the patient's data, service, age, etc. But, although the timetables in **red** are taken, we can use them again as much as we want, giving in these cases in-between appointments to every patient.

To finish the loading, we select the time and a form will be displayed with all the selected data to make an appointment; if we agree, we click on the **green** OK bottom and the appointment will be loaded.

## How do I load more than one appointment for the same patient?

[index](#)

After making the first appointment, from a series of appointments we must give to the patient, we can see that the main data, such as patient, professional and service are loaded, so we just have to choose the date through the upper **red** date or its bottoms TODAY +7, +14 o +21 and finally the new timetable.

## How do I load an appointment from the schedule? [index](#)

In both, morning and afternoon schedules, every row is an appointment for a particular patient. We can see that on the left of each row, there are two white bottoms; the second from left to right is for making an appointment for the patient, professional and service of that appointment. When it is clicked, we will be taken to the appointment tab, with its main three data (patient, professional and service) loaded; we would only have to choose the date and time of the appointment.

## How do I reschedule an appointment? [Index](#)

For those appointments which have been cancelled because the patient can not go and wishes to reschedule it, for a different date or time, we can do it by clicking on the bottom from the state column. There we will find a form which contains the schedule data in **red** in the upper part. Then we click on the **blue** bottom with the pencil icon located on the right of the date and time of the appointment and a form will be displayed in which we can change the professional, date and time of the schedule. With this feature we avoid cancelling an appointment in case the patient wishes to reschedule it. This process modifies an appointment without adding a new one.

## How do I pay and finish an appointment? [index](#)

In the schedule, over each appointment, we can see two bottoms on the right. The first one, from right to left, shows us the state of the appointment with the colors pending, done and canceled, and the second shows us the payment state with the colors unpaid and paid.

If we click on the state bottom, a form will appear and this could be modified to done or canceled or put back to pending.

If we click on the payment state bottom, a form will appear in which we can make a payment and at the same time change the state of the appointment, comprising with this bottom the functions of the two bottoms.

In the form that appears when clicking on the payment bottom, we can choose two payment options: Cash, Medical Insurance and Plans (the last one is only available if the



office allows it)

If we choose Cash, we can add the consultation fee and the money the patient paid. Some explanations must be made:

If the payment is the same as the consultation fee, the appointment will be paid.

If the payment is less than the consultation fee, the appointment will be partially paid

If the payment is more than the consultation fee, the appointment will be paid and the rest will be credited to the patient. This is the method used in plans with several consultations that are paid in advance. For example, if the consultation fee is \$120 and

the payment is of \$1200, a plan on 10 consultations has been created. So simple!

This application makes the payment process much simpler because it includes the last preloaded consultation fee and the suggested amount which is the same as the consultation fee; if the patient has a credit balance, it also shows the previous one and the one after the consultation has been discounted. After preloading these data, the only thing that must be done is to click on OK.

Here we have a question: Why is the consultation unpaid if the patient has a credit balance? This is because the operator needs to pay the consultation the day the patient comes to be assisted, since in the cash report there will appear the payment with credit balance.

In the case of plans, the functioning is similar to the cash payment with credit balance, but in this case it is necessary to have the offered plans loaded.

In order to pay the plans we must choose the option Tables in the side menu; select the Plans table and load the plans with their names, the individual consultation fee and the number of sessions this plan covers. To understand this process more clearly we suggest you to see: [How does the option side menu table works?](#)

Once the plans have been loaded, we click on the bottom Unpaid and we will access to the payment form; there, we choose the option Plans. Here we can select the plan chosen by the patient by clicking on the **green** bottom with the icon check or cancel it with the **red** one with the icon X.

From the moment we take the plan we can see that the consultation fee is derived from it and we just have to enter the amount of money given by the patient. In this case we can complete it or pay it partially and frontmy will show the balance in **red** indicating what it is owed.

In addition, from the next session, the application indicates the number of sessions

already taken and the date in which the plan began.

## How do I visualize the current account, consultation records and the tracking of patients? [index](#)

There are two ways to access this information; the first one is through the magnifying glass icon, which appears in the upper bar. When clicking on it, a searching bar is displayed and if we type the last name, name or ID, a list will appear for us to select the patient. Once selected, a window with three tabs will be displayed. The first one shows the chronological consultation record; the second, the current account with its movements and balance, not only cash but also in Medical Insurance sessions.

Important: since this is the patient's current account, seen from the office side, we will see that a Negative balance indicates that it is a Credit balance for the patient, and a Positive balance is a Debit balance for the patient.

And the third tab displays the tracking of a patient, done through phone calls with its date and time, operator and the patient's reply.

The second way to access this information is through the first white bottom located over each appointment. This will access the Record, Current Account and Tracking window of the patient belonging to that appointment.

## How do I send a reminder message via SMS to a patient? [index](#)

In order to send this reminder, it is necessary to proceed to the office Administrator. In the side menu, which is opened with the left bottom in the upper bar, we access Administration and then Offices' Settings. In the central section we will find the option SMS alert. Here we can select the option Activate SMS and choose the type default Reminder.

Since this service has an additional charge with each SMS sent, we must buy SMS packages. To do this, we need to see that in the central section, there are three tabs, one of them with the name SMS Packages, if we click on this tab, a grid will be displayed with the packages available with different numbers of SMS, ranging from 100 to 1500, each with a different price and a **green** bottom to the right which allows us to buy.

Important: this is a service currently available in Argentina.

Once this is done, every time we make an appointment, in the last form where we confirm the appointment's data, the following information will appear:

- The option to send this reminder and the cellphone number to which it will be sent.
- The type of reminder it will be used (1,2,3,6 or 24 hours before the appointment set

- time)
- A caption with the time in which the reminder will be received. In **green** if the time is appropriate, after 7.30 a.m., or in **red** if the time is inappropriate, between 11 p.m. and 7 a.m.
  - And finally the number of SMS available.

After sending the SMS, if the patient answers the message, we will see a **red** icon over the appointment. If we mouse over it, we could see their replies.

## How do I send a reminder message via e-mail to a patient? [index](#)

The application sends an e-mail automatically with the reminder 24hs before the appointment without the operator's intervention.

If we do not want the application to send this reminder, it is necessary to enter the office Administrator In the side menu, which is opened with the left bottom in the upper bar, we access Administration and then Offices' Settings. In the central section, we will find the option E-mail 24. Here we can deselect the option Activate -E-mail 24.

Here we can also set up a title and e-mail body that will go with all the 24hs-E-mails. This helps disseminate information to all patients.

## How do I change the professional's service hours? [index](#)

Inside the application every professional has a grid with the days and timetables they work. In order to access this grid and modify it, we can do it from the appointment tab, on the right of the professional field. Here we click on the **blue** bottom with pencil icon to access a form with two tabs; the first one with the Main Data and the second with the Timetables. If we click on Schedules, we access a grid with the days and times in which the professional works.

In this grid we can see the weekdays presented as columns, and as rows, the starting and finishing times of the working day, starting and finishing times of breaks and the consultation length in minutes.

The consultation length in minutes will be used in this application to make a grid of the professional available hours for appointments. For example, a length of 5 minutes, with a starting time at 8 a.m., will make a grid with the following timetables: 8:00, 8:05, 8:10, 8:15 and so on.

After making the necessary changes, we click on the **green** OK bottom to load the new data.

## How does the option side menu tables works? [index](#)

Inside the application you can load, modify and delete registers of the different charts that constitute it. A table, is a structure that stores information of the same kind, for example the Professional table, stores all the professionals; the Patient table, stores all the patients.

When selecting the option Tabs from the side menu, we access to a robot that works inside the application, and which allows us to create a new register in the chosen table, change any data, or delete a new particular register. Also, it allows as to navigate through the different registers in the table or to make a search there. All this in a single interface.

If we choose the Professionals table, for instance, the robot sets in the browse, search, modification or discharge mode over the professionals' registers

Once the table is chosen, we click on the **red** bottom with the + symbol and a new register can be load.

After completing the data, by modifying or loading a register, we click on the OK bottom to save them.

To delete a register, we choose the table, browse or search until finding what we want to delete, we click on the Delete bottom and the robot will make the necessary control to allow us to delete or deny the action. If the robot denies the deletion of a register, it is because a Professional, for instance, has appointments assigned and consequently it is impossible to leave an appointment with a professional.

## How do I load a date in which a professional or all the office do not work? [index](#)

To cover this point it is necessary to read the previous question:

### How does the option side menu chart works?

In this application this dates are called Invalid Dates.

In order to load an invalid date, we must access the side menu, which is opened with the left bottom in the upper bar, then go to Tables and finally we click on the Invalid Dates table. Here we can load a new Invalid Date, modify or delete an existing one.

In the form we have the following fields:

- Start date: date and time of the beginning of the invalid date.
- End date: date and time of the end of the invalid date.
- Professional: if this is a date for a professional in particular, we choose

the professional.

- Service: if this is a date for a service in particular, we choose the service.

If we only load the start and end dates, this invalid date will include all the office. If we choose a professional, this invalid date will only be for that professional. If we choose a professional, this invalid date will only be for that professional. If we choose a professional and a service, this invalid date will be for that professional but for that service in particular.

### How do I issue a cash report? [index](#)

The application keeps record of all the cash movements done at the moment of paying an appointment.

In the side menu, which is opened with the left bottom of the upper bar, we access the options Reports and then Cash Report.

This will display a screen with the necessary parameters to issue the report, for instance, start and end date, Professional, the option to issue the cash report of a professional in particular, initial balance if we want to load the amount of money entered to start the cash report and finally the Appointment to issue the complete cash flow report or just the morning or afternoon appointment separately.

The report has PDF format and can be printed or downloaded.

### How do I issue a schedule report? [index](#)

In the central section, inside the Morning Schedule or Afternoon Schedule tab, we will find a bottom with the caption Print Schedule. When clicking, a menu will be displayed to print the complete schedule or just the morning or afternoon

If we wish to print a professional schedule, on the left of this bottom, we will find a selector where we can choose a professional to filter the schedule and then we proceed to print.

The report has PDF format and can be printed or downloaded.

### How do I load a new office to my group? [index](#)

The applications can manage unlimited offices and countries, all of them under a single Group of offices.

When completing the register process in the application, a Group with a single office will be created and, according to the chosen plan, it will be possible to load two offices in the Business plan or unlimited offices in the Corporate plan.

In order to start the loading of new offices, it is necessary to proceed to Supervisor of Offices' Group. In the side menu, which is opened with the left bottom of the upper bar, we access Administration and then Offices' Settings. In the central section we will find three tabs: Set up Office, Subscription Plans and SMS Packages.

In the Set up Office tab we see an office selector and to the right a green bottom with the + symbol that will allow us to load a new office to the Group. By clicking on this bottom, we access to a form with the necessary fields to load an office.

Important: when creating offices in different countries, a charge will be generated equal to the amount of the subscribed plan. For example: we can create unlimited offices in Argentina, country in which the group was registered; then, when creating a new office but this time in Brazil, a one-time charge will be generated to the new country, allowing to create unlimited offices in Brazil.

After creating the new office, we should create users with access to this office. To understand this see the following question: **How do I create a new user so that he/she can access the application?**

## How do I create a new user so that he/she can access the application? [index](#)

The users' status structure in the application is according to the status of authorization of each one:

- **Supervisor:** They have complete access to the group of offices. There is only one and it is the first user created automatically by the application at the registration moment.
- **Administrator:** They have complete access to the group of offices.
- **Secretary:** They have access to the management of Schedules, Patients and Professionals with complete access to the cash flow report.
- **Assistant:** They have access to the management of Schedules, Patients and Professionals; they can only see the daily cash flow report.
- **Operator:** They have access to the management of Schedules, Patients and Professionals without access to the cash flow reports.
- **Professional:** They have access to the management of Schedules, Patients and Professionals with access to their cash flow reports and the statistics dashboard.

Now, if we want to create a new user or see our office's users, it is necessary to proceed to the office Administrator. In the side menu, which is opened with the left bottom in the upper bar, we access Assistants and then Users' Settings. In the central section a grid will be displayed with the data of the latest registered users in our application and in the upper area there will appear a green icon with the + symbol to load a new user. When clicking on the icon, it will show a form with fields to complete in order to load a new user.

First we can choose the office in which the new user will have access to, their name and last name, e-mail address (required as user to log in the application), password, status and whether they have available access.

Once the data has been filled, we click on the **green** OK bottom and we will have a new user loaded and ready to log in the application.

Inside the grid, there will appear the new user, with their data and a **blue** bottom with the pencil icon that will allow us to modify the information.

## How do I track my patients? [index](#)

In the central section of the application we click on the Tracking tab. Inside this tab, a Patient grid will be displayed which can be filtered through three criteria that are located in the header.

The first criterion is based on the number of days that have elapsed since the last patient visit; you can have access to these intervals administration by clicking on the **green** bottom with the gear symbol. When entering the intervals window, we can define its upper and lower level and the color representing that interval. Also, we can add as many intervals as we wish by clicking on the **green** bottom with the + symbol.

The second criterion filters those patients who have had their appointments canceled in the last X days, having 20 days preloaded by default and giving the possibility to change it.

Finally, the third criterion is based on the visualization of those patients who still do not have contact phone calls.

To the left of each filter there is a mark that allows us to activate and deactivate each filter individually.

In the patients' grid, each row is a patient and each column the tracking information. On the far right of each column we find the first **light blue** bottom with a telephone icon and a number indicating the number of contact phone calls made.

If we mouse over this bottom, a caption will appear with the last phone call made, with its date and time. If the number of phone calls remains zero, the color of this bottom will be **light blue**; however, after the first call, it will change to **green**.

The next **blue** bottom with the telephone icon allow us to make a new contact call, with its date, time and the caption of the call.

The last white bottom allows us to make a quick appointment for this patient.

In the grid we will see that the color of the patient's name changes according to the color we choose for every interval.



These same colors are repeated in the appointment schedule, which allows us to track the patients who come to our office.

**What do I do if my questions is not in this tutorial?** [index](#)

Send us an e-mail to [soporte@frontmy.com](mailto:soporte@frontmy.com) with your questions, we will reply as soon as possible and we will incorporate your doubt to our FAQs.

All together we will continue making this tutorial grow.

We continue improving so that you can have a better experience with frontmy.

# Thanks for using frontmy.com!