



# eSchedules

A quick guide to your new system

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## How to log on

To log on to eSchedules go to [www.bo.scot.nhs.uk/BOE/BI](http://www.bo.scot.nhs.uk/BOE/BI)

Enter your username and password and click 'LOG ON'

### Note

Your username and a temporary password are sent to your personal email account in 2 separate emails. They will come from 'csdnoreply@nhsnss.scot.nhs.uk' or 'noreply dis@nhsnss.cot.nhs.uk'

There is a link in the password email with instructions on how to change this to a permanent one. If you have forgotten your username or password, please contact the NSS Customer Service Helpdesk on 0131 275 7777 or [nss.csd@nhs.net](mailto:nss.csd@nhs.net)

The screenshot shows the NHS BI Reporting login page. The page header includes the NHS Scotland logo and the text 'NSS BI Reporting NHS Scotland'. Below the header, there is a section titled 'Use of Data in Individual Patient Care or Judging Staff Performance' with a disclaimer. The main content area contains the following text: 'NHS Scotland is committed to maintaining confidentiality. Every effort has been made to ensure the security of information held by the organisation. If you are authorised to view confidential information which is held by NHS National Services Scotland, you should be aware of the relevant confidentiality requirements and adhere to these requirements. Audit of access to the Corporate Data Warehouse. Click [here](#) to view details of CDW auditing. Best Practice - access the Best Practice document [here](#).' Below this text, there is a form with the following fields: 'User Name:', 'Password:', and 'Authentication: LDAP'. A 'Log On' button is located at the bottom right of the form. A 'Help' link is also visible at the bottom right. Three blue callout boxes provide additional information: 1. 'Enter your username. It must be in lower case.' points to the User Name field. 2. 'Enter your password. This is one chosen by you.' points to the Password field. 3. 'This field is pre filled. Do not remove or amend.' points to the Authentication dropdown menu.

**Password requirements**

A minimum of 8 characters containing a mixture of letters (upper and lower case) and numbers only. The first character must be a letter in upper case.

Enter your username. It must be in lower case.

Enter your password. This is one chosen by you.

This field is pre filled. Do not remove or amend.

### Important

To allow your eSchedules home page to be set, we ask that after your initial log on, you log out, wait overnight and when you log in again; all your settings will be applied.

## eSchedules homepage

The eSchedule homepage lists all reports available to view, as well as a link to the eSchedules guidance section on our web site.

There is also a link to the latest schedules communications, as well as archived editions. The schedule communications keep you up to date with the latest news and helpful advice from us.

The screenshot shows the 'My eSchedule Reports' section of a website. It lists various reports under 'Payment Schedule Reports' and includes sections for 'Important' information, 'Latest News', and 'Additional communications'. Three blue callout boxes provide instructions: one points to the list of reports, another points to the 'Guidance' link, and a third points to the 'schedule communications' link in the 'Latest News' section.

**My eSchedule Reports**  
Treatment, payment and patient reporting

The following reports are available:

Payment Schedule Reports

- [Remittance Advice](#)
- [Remittance Breakdown \(Account 14\)](#)
- [Itemised Patient Payment](#)
- [Adjustments to Claims](#)
- [Adjusted Claims](#)
- [Additional Payments and Recoveries](#)
- [Items Summary](#)
- [Patient Information](#)

**Important**  
Information displayed in a report will be correct for the date you run it.  
[Guidance](#)

**Latest News**  
You can view the latest [schedule communications](#) from us, together with the relevant industry news in the publications section of our web site. This month we include:

**Additional communications**  
None

Click on the eSchedule report you wish to view.

Access guidance on your eSchedule reports here.

Access the current and archived schedule communications here.

## Running a schedule report

To run a report, you need to enter information into a 'prompt box'. This box will appear as soon as you select a report from the home page. The information you enter will allow you to run a report for either the current or a historical schedule, and for all or specific payment location codes that you are eligible to view.

### Reports

There are 8 reports which have the same prompt box, and require the same information to be entered:

- **Remittance Advice**
- **Remittance Breakdown (Account 14)**
- **Reconciliation**
- **Adjustments to Claims**
- **Adjusted Claims**
- **Additional Payment and Recoveries**
- **Items Summary**
- **Patient Information**

# Current schedule

## 1. Run a current schedule for all eligible payment location codes

Prompts

Prompt Summary	Select values for prompts	Actions
Select Schedule Month-Year to filter or leave blank for latest month: no value	> Select Schedule Month-Year to filter or leave blank for latest month:	
Select Payment Location Code to Filter or leave blank for All: no value	> Select Payment Location Code to Filter or leave blank for All:	
Select NHS Board Name to Filter or leave blank for All: no value	> Select NHS Board Name to Filter or leave blank for All:	

Run

**1** If you wish to run a current schedule for all eligible payment location codes you can view, simply click the 'Run' button.

## 2. Run a current schedule for specific payment location codes

**Prompt Summary**

Prompt Summary	Select values for prompts	Actions
Select Schedule Month-Year to filter or leave blank for latest month: no value	> Select Schedule Month-Year to filter or leave blank for latest month:	
✓ Select Payment Location Code to Filter or leave blank for All: no value	▼ Select Payment Location Code to Filter or leave blank for All: <input type="text" value="Enter a value"/> +	
Select NHS Board Name to Filter or leave blank for All: no value	Choose Values pmSelect Payment Location Code to Filter or leave blank for All: Search <input type="text"/> <input type="checkbox"/>	

**Select values for prompts**

Value	Description
<input type="checkbox"/> 10,003	
<input type="checkbox"/> 10,011	
<input type="checkbox"/> 10,029	
<input type="checkbox"/> 10,037	
<input type="checkbox"/> 10,045	

Buttons: OK OK Cancel Run

**1** Click on Payment Location Code it will turn grey and a tick will appear.

**2** Click on the icon to show all payment location codes. You will only be able to run reports for those you are eligible to view.

**3** Select on the payment location codes you require. Click OK.

**4** You also have the option to enter the payment location code manually into this box. Once entered click the + icon and it will move into the box below. Repeat if you wish to add more.

**5** Click 'Run' to run the report.

# Running a historical schedule report

You can view 7 years (6 years plus the current financial year).

## 1. Run a historic schedule for all eligible payment location codes

**Prompt Summary**

- ✓ Select Schedule Month-Year to filter or leave blank for latest month:  
no value
- ✓ Select Payment Location Code to Filter or leave blank for All:  
no value
- ✓ Select NHS Board Name to Filter or leave blank for All:  
no value

**Select values for prompts**

▼ Select Schedule Month-Year to filter or leave blank for latest month:  
no value


Choose Values for Select Schedule Month-Year to filter or leave blank for latest month.

Search

Value	Description
<input type="checkbox"/>	
<input type="checkbox"/>	SEP 2020
<input type="checkbox"/>	AUG 2020
<input type="checkbox"/>	JUL 2020
<input type="checkbox"/>	JUN 2020
<input type="checkbox"/>	MAY 2020

OK Cancel

Run


- 1 Click on Select Schedule Month Year it will turn grey and a tick will appear.
- 2 Click on the  icon to show all schedule months eligible to view.
- 3 Select on the schedule months you require. Click OK.
- 4 Click 'Run' to run the report.



## 2. Run a historic schedule for specific payment location codes

Follow the steps above to select the schedule month. Do not click Run to run the report, until you select the list number, see below.



**1** Click on Select Payment Location Code it will turn blue.

**2** Click on the  icon to show all payment location codes. You will only be able to run reports for those you are eligible to view.

**3** Click on the payment location codes you require. Click OK.

**4** You also have the option to enter the payment location code manually into this box. Once entered click the + icon and it will move into the box below.

**5** Click 'Run' to run the report.

Prompt Summary	Select values for prompts	Actions												
Select Schedule Month-Year to filter or leave blank for latest month: no value	> Select Schedule Month-Year to filter or leave blank for latest month:													
✓ Select Payment Location Code to Filter or leave blank for All: no value	▼ Select Payment Location Code to Filter or leave blank for All: <input type="text" value="Enter a value"/> +													
Select NHS Board Name to Filter or leave blank for All: no value	Choose Values pmSelect Payment Location Code to Filter or leave blank for All: Search <input type="text"/>  													
	<table border="1"><thead><tr><th>Value</th><th>Description</th></tr></thead><tbody><tr><td><input type="checkbox"/> 10,003</td><td></td></tr><tr><td><input type="checkbox"/> 10,011</td><td></td></tr><tr><td><input type="checkbox"/> 10,029</td><td></td></tr><tr><td><input type="checkbox"/> 10,037</td><td></td></tr><tr><td><input type="checkbox"/> 10,045</td><td></td></tr></tbody></table>	Value	Description	<input type="checkbox"/> 10,003		<input type="checkbox"/> 10,011		<input type="checkbox"/> 10,029		<input type="checkbox"/> 10,037		<input type="checkbox"/> 10,045		
Value	Description													
<input type="checkbox"/> 10,003														
<input type="checkbox"/> 10,011														
<input type="checkbox"/> 10,029														
<input type="checkbox"/> 10,037														
<input type="checkbox"/> 10,045														
	<input type="button" value="OK"/> <input type="button" value="Cancel"/>	<input type="button" value="Run"/>												

## Navigating through your reports

Once you have run a report there are a number of options available that will help you navigate through, export, print or save the reports.

The screenshot shows a web browser window displaying a report. The browser's address bar shows '1 of 797' pages and '100%' zoom. The report content includes a header 'My eSchedule Reports' with the subtitle 'Treatment, payment and patient reporting'. Below this is a section titled 'Your Ophthalmic Remittance Advice - Paid under the National Health Service (Scotland) Act'. This section contains fields for 'Payment To :', 'Payment Run :', 'Payee No.', 'Sort Code', and 'Bank A/C'. At the bottom, there is a table with columns for 'CONTRACTOR', 'PAYMENT LOCATION CODE', and 'AMOUNT'. The table has three rows, with the last row containing the text 'AMOUNT PAID'.

Callout boxes provide the following instructions:

- Change the size of the report. (points to the 100% zoom dropdown)
- Export to Portable Document Format (PDF) for printing. (points to the PDF icon)
- Export to your computer in PDF, Excel or Comma Separated Values (CSV) file. (points to the PDF, Excel, and CSV icons)
- Select the first or last page of the report. (points to the '1 of 797' page indicator)
- Switch between each of the pages of the report, or enter the page number (points to the navigation icons)

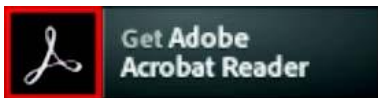
# Exporting reports

Once you have run a report, you have the option to print or save to your computer in a variety of formats. These formats can also be viewed online. To do this you must first 'export' the report.

There are 2 ways in which you can do this.

## 1. To export to PDF for printing

To view a report as a PDF you must have Adobe reader installed on your computer. You can download the latest version of Adobe Reader for free at <https://get.adobe.com/uk/reader/>



The screenshot shows the Adobe Acrobat Reader interface. The toolbar at the top contains icons for Print and Save As PDF. Two callout boxes, labeled 1 and 2, point to these icons respectively. The main content area displays a report titled 'My eSchedule Reports' with the subtitle 'Treatment, payment and patient reporting'. Below this is a section for 'Your Ophthalmic Remittance Advice - Paid under the National Health Service (Scotland) Act'. It includes fields for 'Payment To :', 'Payment Run :', 'Payee No.', 'Sort Code', and 'Bank A/C'. At the bottom, there is a table with columns for 'CONTRACTOR', 'PAYMENT LOCATION CODE', and 'AMOUNT'. The table has two rows of data, with the second row containing 'AMOUNT PAID' in the 'AMOUNT' column.

CONTRACTOR	PAYMENT LOCATION CODE	AMOUNT
		AMOUNT PAID

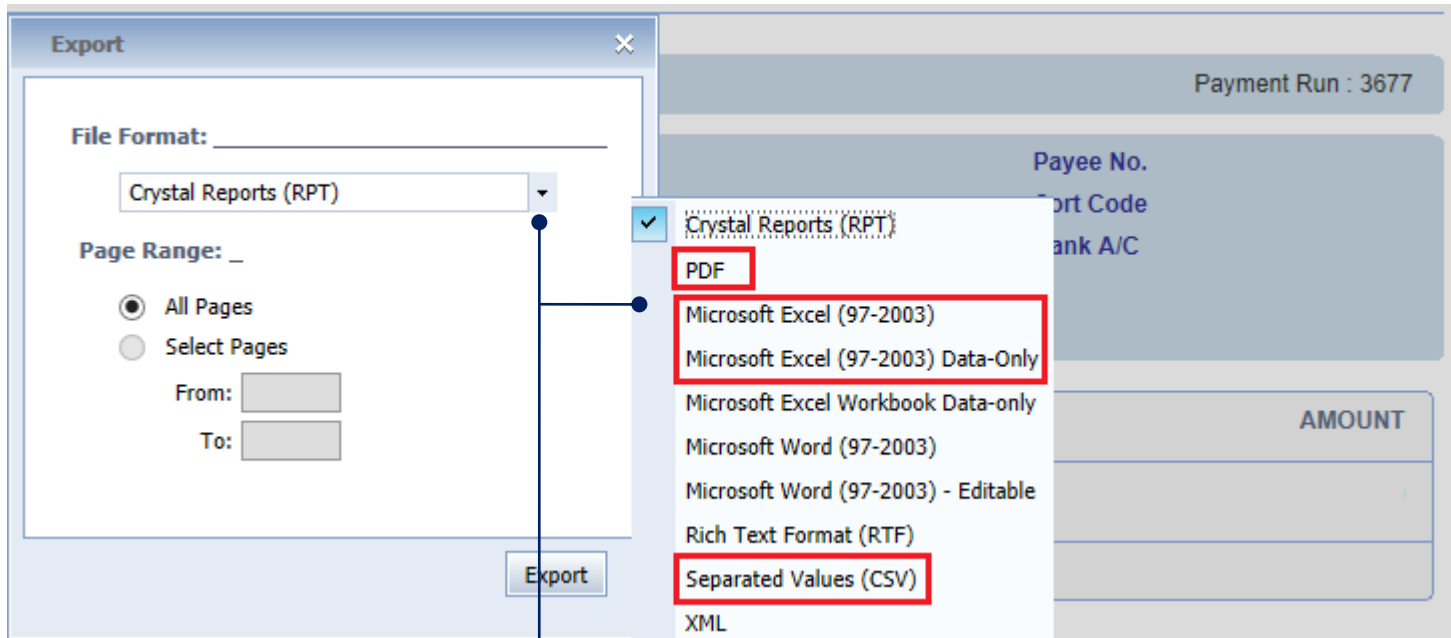
To export as a PDF select either of these options (see below for option 2).

This will allow you to view on screen without the need to scroll through the pages. You can also print or save to your computer using this option.

## Exporting reports continued

### 2. To export a report to your computer in Excel or CSV format

To export, you must have Microsoft Excel installed on your computer. Once you have exported your report in your preferred format, you can then save to your computer or print.



Click on the format you require:

PDF  
Microsoft Excel (97 2003) Data only  
Separated Values (CSV)



**User name or password queries:**

NSS Customer Service help desk on 0131 275 7777 or [nss.csd@nhs.scot](mailto:nss.csd@nhs.scot)

**Issues viewing, running or general report queries:**

Ophthalmic Customer Service helpdesk on 0131 275 6200 or [nss.psdophthalmic@nhs.scot](mailto:nss.psdophthalmic@nhs.scot)