

# 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 NHSmail account in 2 separate emails.

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.scot](mailto:nss.csd@nhs.scot)

The screenshot shows the NHS BI Reporting login page. The page title is "NSS BI Reporting NHS Scotland". It contains several sections of text, including "Use of Data in Individual Patient Care or Judging Staff Performance", "Data and Statistical Disclosure", and "Access is Monitored". The main content area is titled "NHS Scotland is committed to maintaining confidentiality" and "Enter your user information, and click 'Log On'". Below this is a login form with four fields: "System" (pre-filled with "NSSBOSRV08:6400"), "User Name", "Password", and "Authentication" (pre-filled with "LDAP"). A "Log On" button is located at the bottom right of the form. A "Help" link is also present. Four callout boxes on the right side of the page point to the "System", "User Name", "Password", and "Authentication" fields, providing instructions on how to enter the information.

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

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 and preferences 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 the 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 schedule communications, as well as archived versions. The schedule communications keep you up to date with latest news and helpful advice from us.

**NHS SCOTLAND** Welcome: [ ]

Home | Document List | Open | Send To | Dashboards | Help | Preferences | About | Log Out

PSD Schedules > Homepage

### My eSchedule Reports

Treatment, payment and patient reporting

The following reports are available:

- [Remittance Advice](#)
- [Account 7 General](#)
- [Account 7 Commitment](#)
- [Additional Payments and Recoveries](#)
- [Allowances and Superannuation](#)
- [Capitation and Continuing Care Payments](#)
- [Capitation and Continuing Care Patient Information](#)
- [Item of Service Payments](#)
- [Item of Service Detail](#)
- [Item of Service Adjustments](#)
- [Registrations Summary](#)
- [Registrations Detail](#)
- [Superannuation Cumulative](#)

**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 publications pages of our web site. This month we include:

- eSchedules - Helpdesk festive opening hours;
- Strategic vision for eDentistry;
- Childsmile.

**Additional communications**  
There are no additional communications for this month.

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 list numbers that you are eligible to view.

There are 13 reports, categorised as standard and non-standard reports:

### Standard reports

The following reports have the same prompt box and require the same information to be entered:

- Account 7 General
- Account 7 Commitment
- Additional Payments and Recoveries
- Allowances and Superannuation
- Capitation and Continuing Care Payments
- Item of Service Payments
- Item of Service Detail
- Item of Service Adjustments

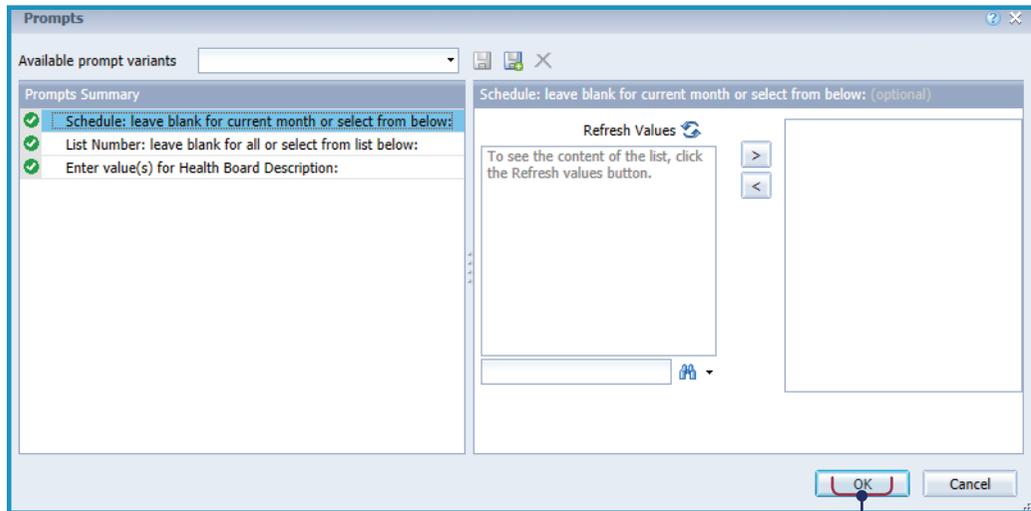
### Non-standard reports

The following reports have different prompt boxes, which require different information to be entered:

- Remittance Advice
- Capitation and Continuing Care Patient Information
- Registration Summary and Registration Detail
- Superannuation Cumulative

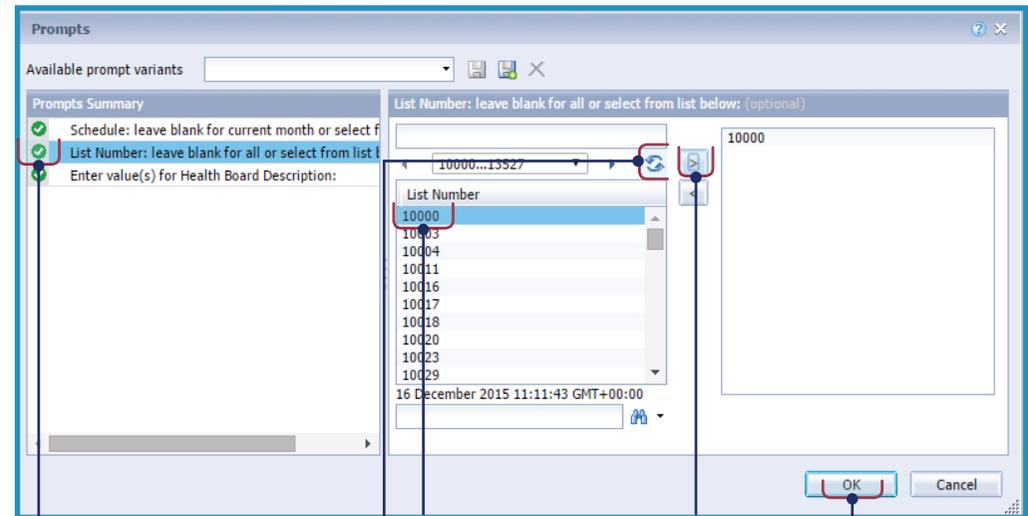
# Current schedule

## 1. Run a current schedule for all eligible List Numbers



If you wish to run a current schedule for all eligible List Numbers you can view, simply click the OK button.

## 2. Run a current schedule for specific List Numbers



1 Click on List Number. It will turn blue.

2 Click on the Refresh Value icon to show all list numbers you are eligible to view.

3 Click on the List Number you require. You can select more than one at a time.

5 Click OK to run the report.

4 Click on the arrow to add List Number to the window on the right for schedules to run.

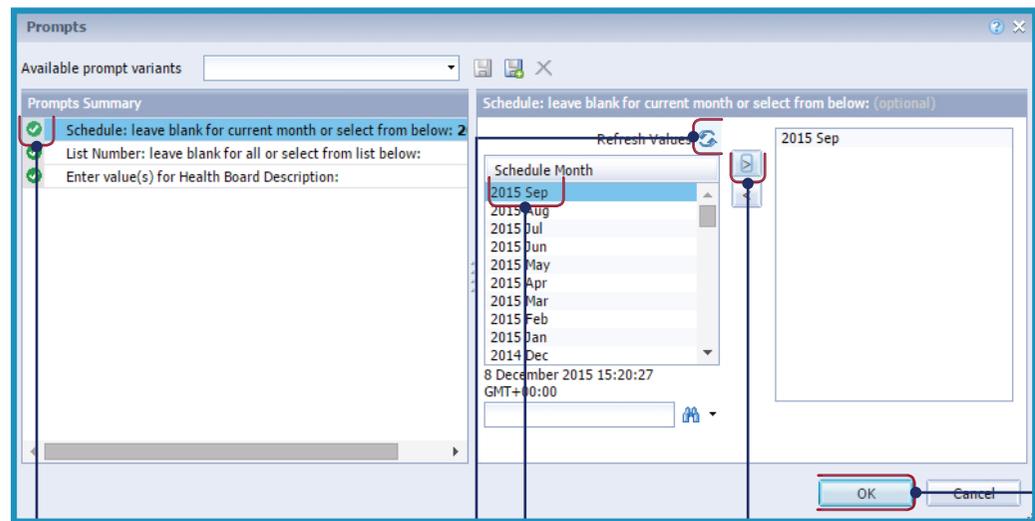
# Running a historical schedule report

You can view 6 years plus the current financial year.

## Note

Historical schedules are not available for the **Capitation and Continuing Care Patient Information report**.

1. Run a historical schedule for all eligible list numbers.



1 Click on Schedule. It will turn blue.

2 Click on the Refresh Value icon to show all schedule months eligible to view.

3 Click on the Schedule Month you require. You can select more than one month at a time.

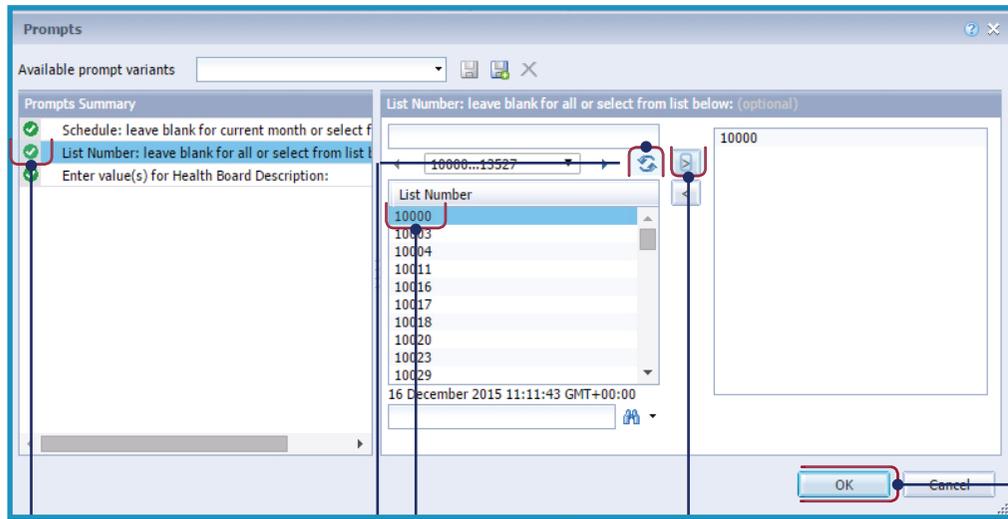
4 Click on the arrow to add the month to the window on the right for schedules to run.

5 Click OK to run the report.

## Running a historical schedule report continued

### 2. Run a historical schedule for specific list numbers

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



1 Click on List Number. It will turn blue.

2 Click on the Refresh Value icon to show all list numbers you are eligible to view.

3 Click on the List Number you require. You can select more than one at a time.

4 Click on the arrow to add List Number to the window on the right for schedules to run.

5 Click OK to run the report.

# Navigating through your reports

Once you run a report, there are a numbers of options available that will help you navigate through them, and also allow you to export, print or save.

Export to Portable Document Format (PDF) for printing.

Export to my computer in PDF, Excel or Comma Separated Values (CSV) file.

The screenshot shows a web application interface for 'My eSchedules Reports'. At the top, there is a toolbar with several icons. Below the toolbar, there are four dropdown menus: 'Health Board Description (All values)', 'Dental Practice (All values)', 'List Number (All values)', and 'Payment Full Date (All values)'. The main content area displays the report title 'My eSchedules Reports' and a table with columns: Case ID, Patient ID, CHI, Postcode, SIMD, Claim Type, and Acceptance Date. Below the table, there are three summary rows with columns: Sum Authorised, Patient Charge, DSS Remission, % Award, Award Amount, Referrals Claimed, Referrals Authorised, and Dep IOS Amount. At the bottom of the interface, there is a navigation bar with a 'Page 1 of 1+' indicator and a '100%' zoom level. Callout boxes point to the toolbar icons for PDF export, the dropdown menus, and the navigation bar.

Use these preferences to switch between your reports for each of your list numbers.

Switch between each of the pages of the report.

Change the size of the report.

# Report filters

You can apply filters which will take you to the information you are looking for quickly. This is useful if you practice at multiple locations.

To remove filters, select the first option in the drop down menu that has 'all values' in brackets. It is recommended that you do this if you wish to print or export a report for all list numbers.

The screenshot shows the BI launch pad interface. At the top, there are several filter menus: 'Health Board Description (All values)', 'Dental Practice (All values)', 'List Number (All values)', and 'Payment Full Date (All values)'. A callout box highlights the 'Health Board Description' menu, showing the first option 'Health Board Description (All values)' and a second option 'NHS LOTHIAN (Remove)'. Below the filters, the page title is 'Reports' and the subtitle is 'Treatment, payment and patient reporting'. The main content area displays 'Your Item of Service Detail report - Paid under the National Health Service (Scotland) Act Payment for the period Sep 2015'. Below this, there are fields for 'List Number 00000' and 'Name FIRST NAME LAST NAME'. At the bottom, there is a table with columns: Case ID, Patient ID, CHI, Postcode, SIMD, Claim Type, Acceptance Date, Sum Authorised, Patient Charge, DSS Remission, % Award, Award Amount, Referrals Claimed, Referrals Authorised, and Dep IOS Amount.

Switch between reports by using the drop-down menus.

The screenshot shows the BI launch pad interface. The filter menus are the same as in the previous screenshot. A callout box highlights the 'Dental Practice' menu, showing the first option 'Dental Practice (All values)' and a second option 'DUNCAN STREET DENTAL CENTRE (Remove)'. Below the filters, the page title is 'My eSchedules' and the subtitle is 'Treatment, payment and patient reporting'. The main content area displays 'Your Item of Service Detail report - Paid under the National Health Service Payment for the period Sep 2015'. Below this, there are fields for 'List Number 00000' and 'Name FIRST NAME LAST NAME'. At the bottom, there is a table with columns: Case ID, Patient ID, CHI, Postcode, SIMD, Claim Type, Acceptance Date, Sum Authorised, Patient Charge, DSS Remission, % Award, Award Amount, Referrals Claimed, Referrals Authorised, and Dep IOS Amount.

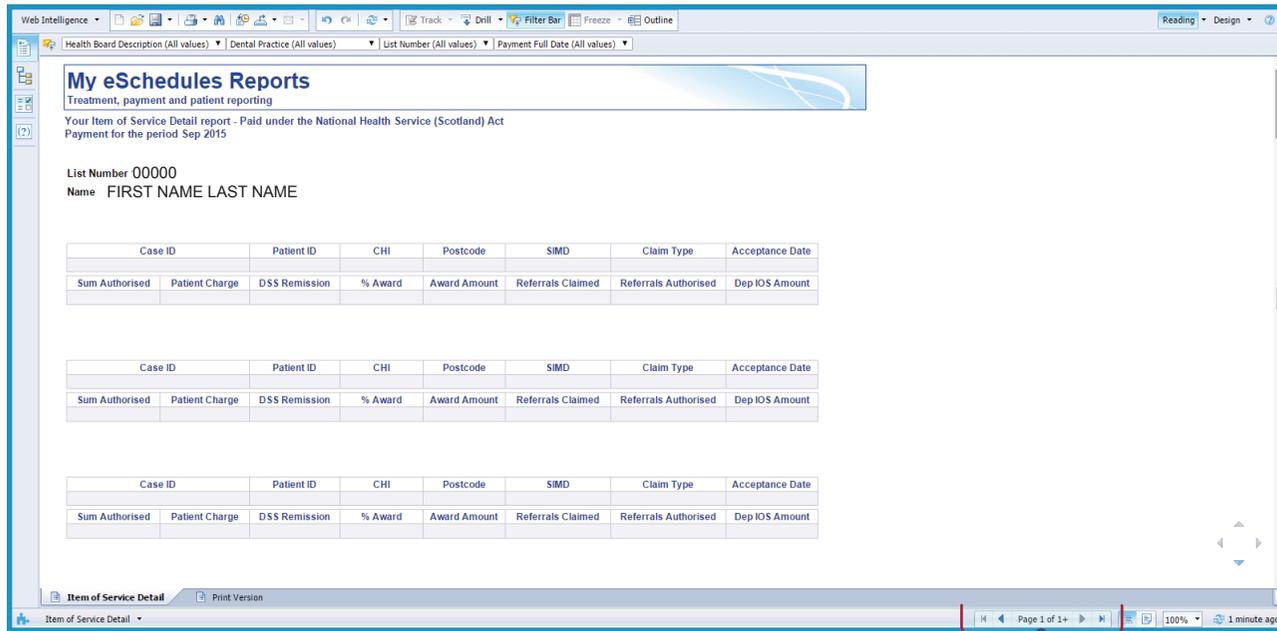
The screenshot shows the BI launch pad interface. The filter menus are the same as in the previous screenshots. A callout box highlights the 'List Number' menu, showing the first option 'List Number (All values)' and a second option '10161'. Below the filters, the page title is 'My eSchedules Reports' and the subtitle is 'Treatment, payment and patient reporting'. The main content area displays 'Your Item of Service Detail report - Paid under the National Health Service Payment for the period Sep 2015'. Below this, there are fields for 'List Number 00000' and 'Name FIRST NAME LAST NAME'. At the bottom, there is a table with columns: Case ID, Patient ID, CHI, Postcode, SIMD, Claim Type, Acceptance Date, Sum Authorised, Patient Charge, DSS Remission, % Award, Award Amount, Referrals Claimed, Referrals Authorised, and Dep IOS Amount.

The screenshot shows the BI launch pad interface. The filter menus are the same as in the previous screenshots. A callout box highlights the 'Payment Full Date' menu, showing the first option 'Payment Full Date (All values)' and a second option '30/09/2015 00:00:00 (Remove)'. Below the filters, the page title is 'My eSchedules Reports' and the subtitle is 'Treatment, payment and patient reporting'. The main content area displays 'Your Item of Service Detail report - Paid under the National Health Service Payment for the period Sep 2015'. Below this, there are fields for 'List Number 00000' and 'Name FIRST NAME LAST NAME'. At the bottom, there is a table with columns: Case ID, Patient ID, CHI, Postcode, SIMD, Claim Type, Acceptance Date, Sum Authorised, Patient Charge, DSS Remission, % Award, Award Amount, Referrals Claimed, Referrals Authorised, and Dep IOS Amount.

The other drop-down menus are shown here.

# Changing pages

When a report runs onto multiple pages, you can switch between the pages using the arrows on the bottom right of the page.



Use the forward and back arrows at the bottom of the page to change page.



Page number is shown here.



You can advance the page, or go back a page by selecting the arrows shown.



# Report view

You can increase or decrease the size of the report, including the text.

The screenshot shows a web browser window displaying a report titled "My eSchedules Reports". The report content includes a header, a sub-header, a list number, a name, and three tables of data. A zoom menu is open on the right side of the report, showing options for page width: Whole Page, 10%, 25%, 50%, 75%, 100% (selected), 150%, 200%, and 500%. The browser's status bar at the bottom indicates "Page 1 of 1" and "100% 1 minute ago".

**My eSchedules Reports**  
Treatment, payment and patient reporting  
Your Item of Service Detail report - Paid under the National Health Service (Scotland) Act  
Payment for the period Sep 2015

List Number 00000  
Name FIRST NAME LAST NAME

Case ID	Patient ID	CHI	Postcode	SIMD	Claim Type	Acceptance Date	
Sum Authorised	Patient Charge	DSS Remission	% Award	Award Amount	Referrals Claimed	Referrals Authorised	Dep IOS Amount

Case ID	Patient ID	CHI	Postcode	SIMD	Claim Type	Acceptance Date	
Sum Authorised	Patient Charge	DSS Remission	% Award	Award Amount	Referrals Claimed	Referrals Authorised	Dep IOS Amount

Case ID	Patient ID	CHI	Postcode	SIMD	Claim Type	Acceptance Date	
Sum Authorised	Patient Charge	DSS Remission	% Award	Award Amount	Referrals Claimed	Referrals Authorised	Dep IOS Amount

Page Width  
Whole Page  
10%  
25%  
50%  
75%  
 100%  
150%  
200%  
500%

Item of Service Detail Print Version  
Page 1 of 1 100% 1 minute ago

Change the size of the report by clicking on the zoom options here.

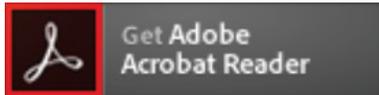
# Exporting reports

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/>

To export as a PDF select this option.

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

The screenshot shows a web browser window displaying a report titled "My eSchedules Reports". The report content includes a header "Treatment, payment and patient reporting", a sub-header "Your Item of Service Detail report - Paid under the National Health Service (Scotland) Act", and a date "Payment for the period Sep 2015". Below this, there is a form with fields for "List Number 00000" and "Name FIRST NAME LAST NAME". Two tables are visible, each with columns: Case ID, Patient ID, CHI, Postcode, SIMD, Claim Type, and Acceptance Date. A dropdown menu is open over the "Print (Ctrl+P)" option, with "Export to PDF for printing" selected. The browser's address bar shows the URL: <https://www.bo.scot.nhs.uk/BOE/portal/1507031418/InfoView/listing/main.do?service=/common/appService.do&appKind=InfoView&...>

### Note

We have produced a 'print version' option for the 3 larger reports:

- Item of Service Detail Report
- Item of Service Adjustment Report
- Registration Detail Report

To access guidance on this, visit: [www.psd.scot.nhs.uk/professionals/dental/professionalsdentaleschedules-print-version.html](http://www.psd.scot.nhs.uk/professionals/dental/professionalsdentaleschedules-print-version.html)

# Exporting reports continued

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

To export a report, you must have Microsoft Excel installed on your computer.

The screenshot shows a web application interface with a report titled "My eSchedule Reports" under the heading "Treatment, Payment and Patient Reporting". The report content includes: "Your superannuation report – Paid under the National Health Service (Scotland) Act", "Payment made for Financial Year 2014/2015", "Name FIRST NAME LAST NAME", and "List Number 00000". Below this is a data table with columns for "Month", "Practitioner", "Assistant", "Approved Remuneration of Assistants", "Remuneration Used For Calculation", and various superannuation and contribution lines (Line 42, Line 46, Line 47, Line 48, Line 49, Line 50, Line 18, Line 22). The table shows data for March, April, and June 2014. An export menu is open, showing options: "Export Document As" (with sub-options PDF, Excel (.xlsx), Excel (.xls), CSV Archive, Text), "Export Current Report As", and "Export Data to CSV ...".

Month	Rates Applied (%)		Line 42	Line 46	Line 47	Line 47	Line 48	Line 48	Line 49	Line 50	Line 18	Line 22
	Practitioner	Assistant	Approved Remuneration of Assistants	Remuneration Used For Calculation	Practitioner's Superannuation Arrears	Practitioner's Superannuation Current	Assistant's Superannuation Arrears	Assistant's Superannuation Current	NHS Board Contribution Principal	NHS Board Contribution Assistant	Additional Pension	Additional Voluntary Contribution
Mar-14	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Apr-14	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jun-14	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

“Export Document As” is the preferred option.

This will ensure the whole report is exported, especially if the report has more than one tab.



**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:**

Dental Customer Service helpdesk on 0131 275 6300 or [nss.psddental@nhs.scot](mailto:nss.psddental@nhs.scot)

If you have difficulty accessing the web site, or would like assistance on how to use Microsoft Excel contact your local dental IT facilitator.

Contact information is available at [www.psd.scot.nhs.uk/professionals/dental/it-facilitators.html](http://www.psd.scot.nhs.uk/professionals/dental/it-facilitators.html)