



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

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 Ophthalmic Customer Service helpdesk on 0131 275 6200 or nss.psdophthalmic@nhs.scot

The screenshot shows the NHS BI Reporting login page. At the top, it says 'NHS SCOTLAND NHS Scotland'. Below that, there is a confidentiality notice: 'NHS Scotland is committed to maintaining confidentially... Every effort has been made to ensure the security of information held by the organisation...'. There are also links for 'Audit of access to the Corporate Data Warehouse' and 'Best Practice - access the Best Practice document here'. The main login area has three fields: 'User Name:', 'Password:', and 'Authentication:'. The 'Authentication' field is a dropdown menu with 'LDAP' selected. A 'Log On' button is at the bottom right. A 'Help' link is at the bottom right. Three blue callout boxes point to the fields: 'Enter your username. It must be in lower case.' points to the User Name field; 'Enter your password. This is one chosen by you.' points to the Password field; 'This field is pre-filled. Do not remove or amend.' points to the Authentication dropdown.

Use of Data in Individual Patient Care or Judging Staff Performance
The information provided to you is derived from systems used in the NHS for the administration of health services or from the registrations held by the General Register Office for Scotland. Although there are quality assurance processes in place, the data may contain undetected inaccuracies about an individual's performance.

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Access
Please t
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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.

NHS SCOTLAND NHS Scotland

NHS Scotland is committed to maintaining confidentially
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](#).

Enter your user information, and click "Log On".
If you are unsure of your account information, contact your system administrator.

User Name:

Password:

Authentication: LDAP

Log On

Help

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 eSchedule homepage layout. At the top left, a blue callout box with the text "Click on the eSchedule report you wish to view." has a line pointing to a list of report titles under the heading "Payment Schedule Reports". These titles include "Remittance Advice", "Remittance Breakdown (Account 14)", "Itemised Patient Payment", "Adjustments to Claims", "Adjusted Claims", "Additional Payments and Recoveries", "Items Summary", and "Patient Information".

At the bottom left, another blue callout box with the text "Access guidance on your eSchedule reports here." has a line pointing to a "Guidance" link located under the "Important" section. The "Important" section contains the text: "Information displayed in a report will be correct for the date you run it."

At the bottom right, a third blue callout box with the text "Access the current and archived schedule communications here." has a line pointing to a "schedule communications" link within the "Latest News" section. The "Latest News" section contains the text: "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:"

The "Additional communications" section at the bottom right shows the text "None".



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**

2. Run a current schedule for specific 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: <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="button" value="🔍"/> <input type="button" value="📧"/>													
	<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		<input type="button" value="OK"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Run"/>
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														

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

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"/> <input type="button" value="🔍"/> <input type="button" value="📧"/>													
	<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		<input type="button" value="OK"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Run"/>
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<input type="checkbox"/> 10,011														
<input type="checkbox"/> 10,029														
<input type="checkbox"/> 10,037														
<input type="checkbox"/> 10,045														

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 titled "My eSchedule Reports". The browser's address bar shows "1 of 797" pages and "100%" zoom. The report content includes a header, a sub-header "Your Ophthalmic Remittance Advice - Paid under the National Health Service (Scotland) Act", and a table with columns for CONTRACTOR, PAYMENT LOCATION CODE, and AMOUNT. The table has a total row labeled "AMOUNT PAID".

Callout boxes provide the following information:

- Export to Portable Document Format (PDF) for printing.** (Points to the PDF icon in the browser toolbar)
- Switch between each of the pages of the report, or enter the page number** (Points to the page navigation icons in the browser toolbar)
- Export to your computer in PDF, Excel or Comma Separated Values (CSV) file.** (Points to the download icon in the browser toolbar)
- Select the first or last page of the report.** (Points to the first and last page navigation icons in the browser toolbar)
- Change the size of the report.** (Points to the zoom percentage dropdown in the browser toolbar)

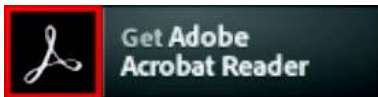
Exporting reports

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/>

A screenshot of the Adobe Acrobat Reader interface. The top toolbar shows various icons, with two callout boxes labeled '1' and '2' pointing to the 'Print' and 'Save as PDF' icons respectively. The main content area displays a report titled "My eSchedule Reports" with the subtitle "Treatment, payment and patient reporting". Below this, it says "Your Ophthalmic Remittance Advice - Paid under the National Health Service (Scotland) Act". There are fields for "Payment To :" and "Payment Run :". A table with columns "CONTRACTOR", "PAYMENT LOCATION CODE", and "AMOUNT" is visible. A blue callout box on the left contains text explaining the export options.

1

2

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.

My eSchedule Reports
Treatment, payment and patient reporting

Your Ophthalmic Remittance Advice - Paid under the National Health Service (Scotland) Act

Payment To : Payment Run :

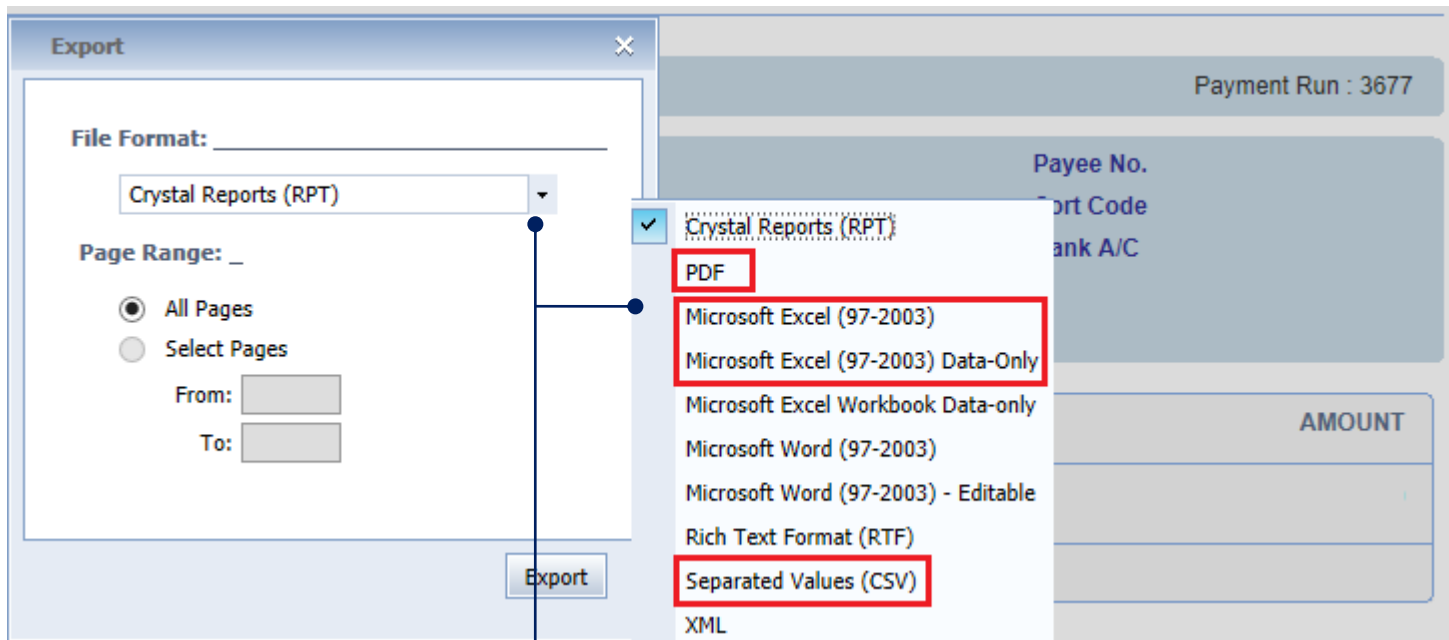
Payee No.
Sort Code
Bank A/C

CONTRACTOR	PAYMENT LOCATION CODE	AMOUNT
AMOUNT PAID		

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)



Username and password queries, or issues viewing, running or general report queries:

Ophthalmic Customer Service helpdesk on 0131 275 6200 or nss.psdophthalmic@nhs.scot