

# Online Reporting

A quick guide to the Online Reporting system



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# How to Log On

To access your reports go to <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 NHS email 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, you can visit the login page on the [Directory Information System](#) website.

The screenshot shows the NHS NSS BI Reporting login page. The page title is "NSS BI Reporting NHS Scotland". It contains several sections of text on the left and a central login form. The login form has three fields: "User Name:", "Password:", and "Authentication:". The "Authentication:" field is a dropdown menu with "LDAP" selected. Below the form is a "Log On" button. Three callout boxes point to the form fields:

- Callout 1: "Enter your username. It must be in lowercase." points to the "User Name:" field.
- Callout 2: "Enter your password. This is one chosen by you." points to the "Password:" field.
- Callout 3: "This field is pre-filled. Do not remove or amend." points to the "Authentication:" dropdown menu.

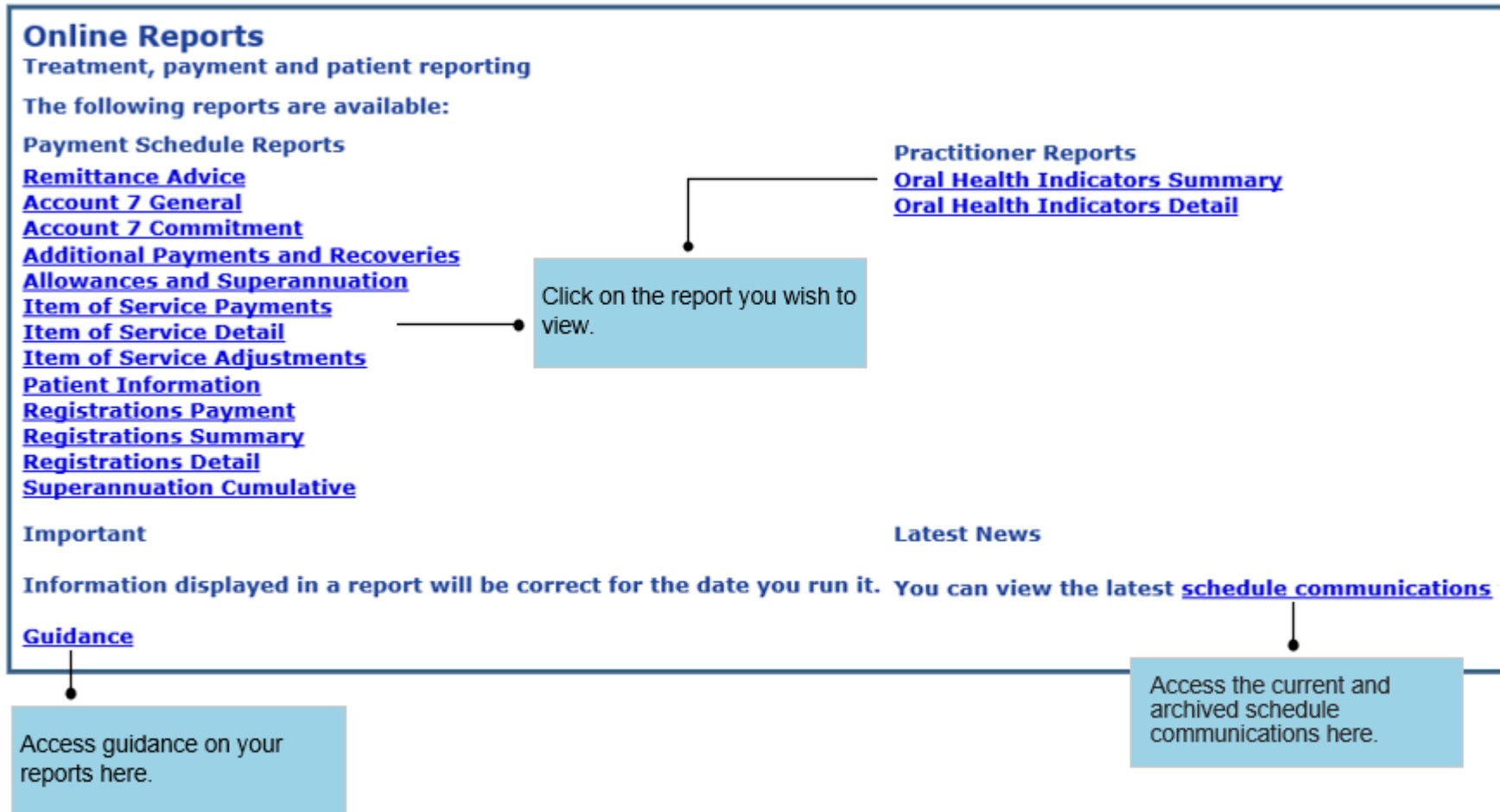
## Important

To allow your Online Reporting 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.

# Online reports homepage

The Online Reports homepage lists all the reports available to view, as well as a link to the 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.



# 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 16 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
- Registrations Payment
- Oral Health Indicators Summary
- Oral Health Indicators Detail

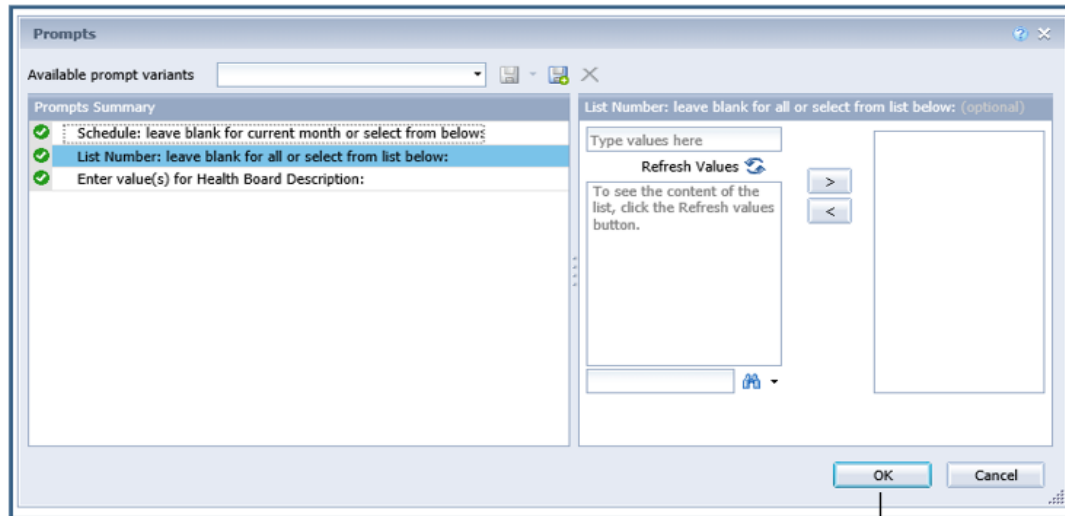
## Non-standard reports

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

- Item of Service Payments
- Item of Service Detail
- Item of Service Adjustments
- Remittance Advice
- Patient Information
- Registration Summary
- Registration Detail
- Superannuation Cumulative

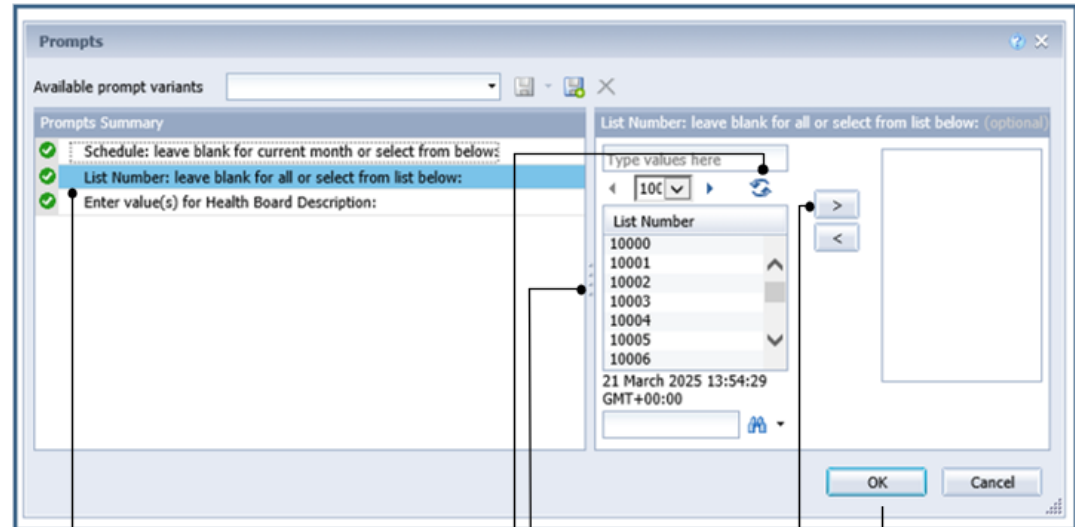
# Current schedule

## 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 prompt, 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 the report to run.

5 Click OK to run the report.

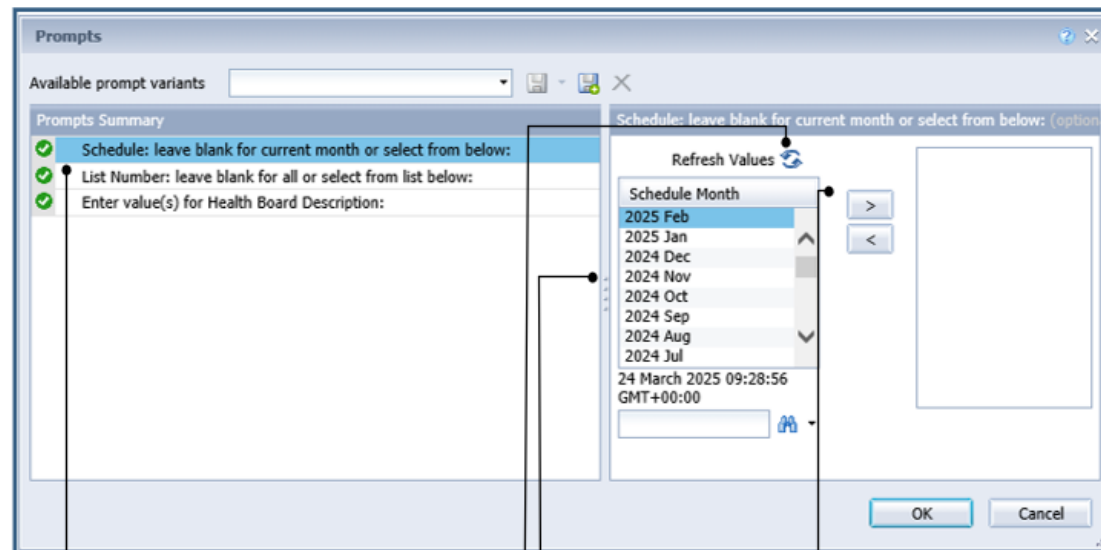
# Running a historical report

You can view 6 years plus the current financial year.

## Note

Historical schedules are not available for the **Patient Information report**.

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



1 Click on Schedule month prompt, It will turn blue.

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

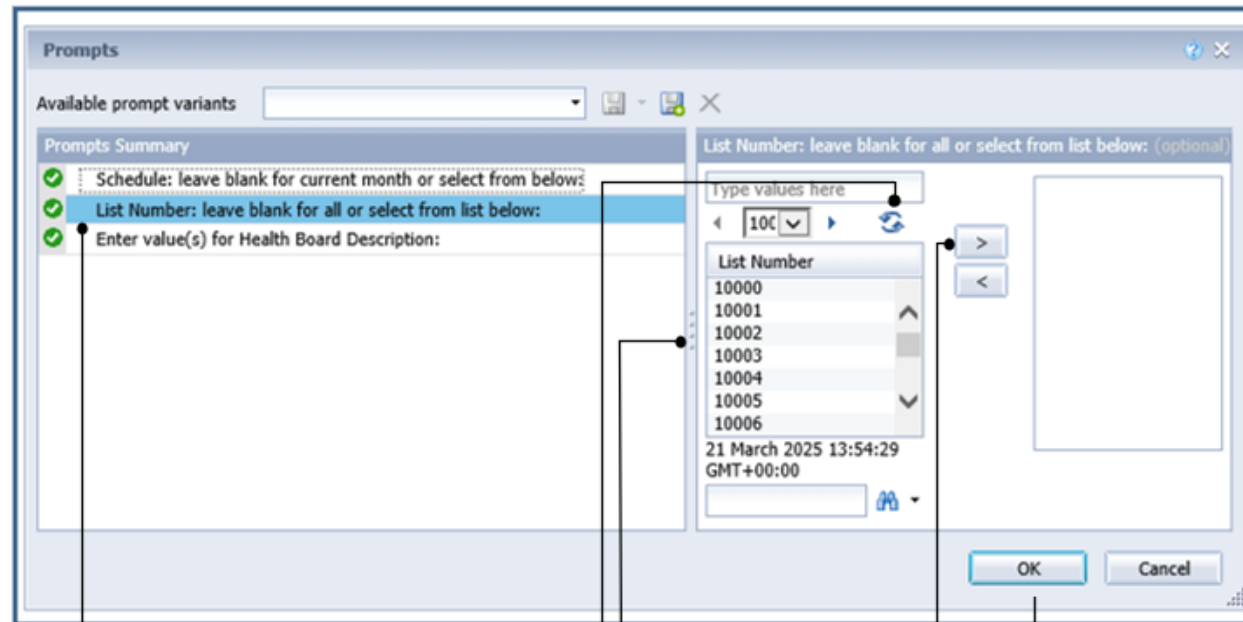
3 Click on the Schedule Month you require. You can select more than one Month at a time.

4 Click on the arrow to add Schedule Month to the window on the right for the report to run.

5 Click OK to run the report.

## 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 prompt, 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 the report to run.

# 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: 'Sum Authorised', 'Patient Charge', 'DSS Remission', '% Award', 'Award Amount', 'Referrals Claimed', 'Referrals Authorised', and 'Dep IOS Amount'. At the bottom of the page, there is a footer with navigation controls, including a 'Page 1 of 1+' indicator and a '100%' zoom level.

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.

Health Board Description (All values) Dental Practice (All values) List Number (All values) Payment Full Date (All values)

Health Board Description (All values)  
NHS Lothian  
(Remove)

## 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

Switch between reports by using the drop-down menus.

Health Board Description (All values) Dental Practice (All values) List Number (All values)

Dental Practice (All values)  
DUNCAN STREET DENTAL CENTRE  
(Remove)

## My eSchedules

Treatment, payment and patient reporting

Your Item of Service Detail report - Paid under the National Health Service  
Payment for the period Sep 2015

Health Board Description (All values) Dental Practice (All values) List Number (All values) Payment Full Date (All values)

List Number (All values)  
10161  
16085  
22023  
26110  
28314  
29753  
37371  
38926  
47383  
47426  
47520  
47696  
47750  
63272  
67124  
68063  
80079  
80092  
80158

## My eSchedules Reports

Treatment, payment and patient reporting

Your Item of Service Detail report - Paid under the National Health Service  
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

Health Board Description (All values) Dental Practice (All values) List Number (All values) Payment Full Date (All values)

Payment Full Date (All values)  
30/09/2015 00:00:00  
(Remove)

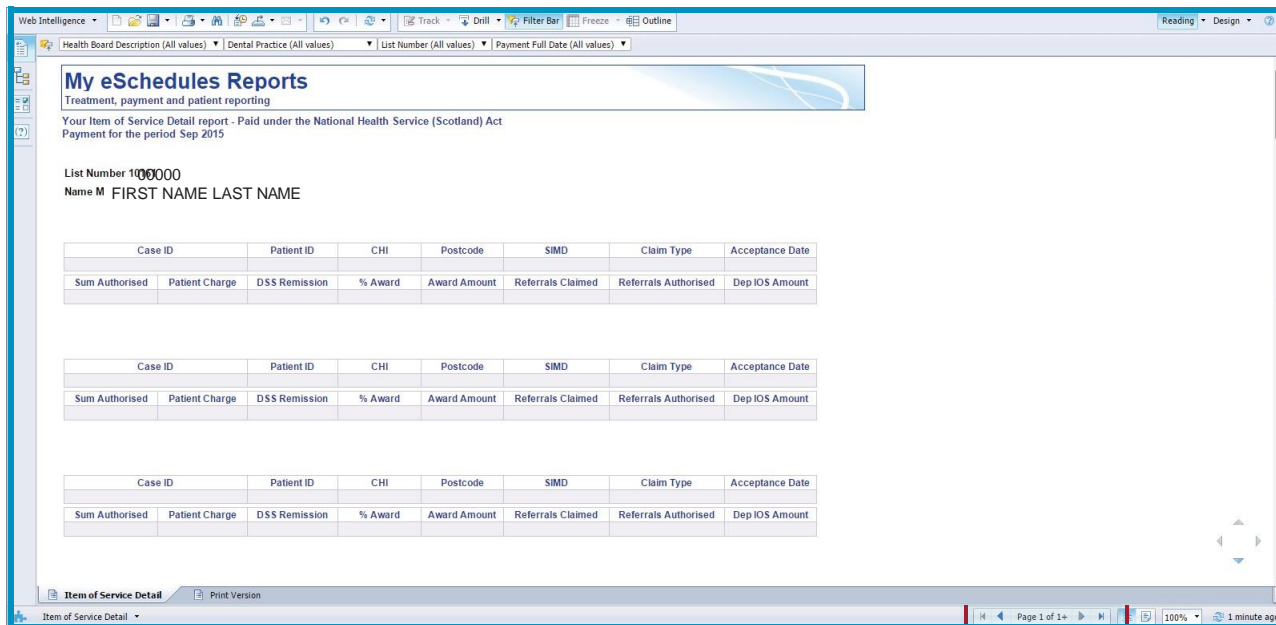
## My eSchedules Reports

Treatment, payment and patient reporting

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 description, a list number, a name, and three tables of data. A zoom menu is open in the bottom right corner of the browser window, 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

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. Export to PDF for printing

To view a report as a PDF you must have Adobe reader installed on your computer.

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 with the URL <https://www.bo.scot.nhs.uk/BOE/portal/1507031418/InfoView/listing/main.do?service=/common/appService.do&appKind=InfoView&...>. 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 (Scotland) Act. Payment for the period Sep 2015". Below this, there are two tables. The first table has columns: Case ID, Patient ID, CHI, Postcode, SIMD, Claim Type, and Acceptance Date. The second table has columns: Sum Authorised, Patient Charge, DSS Remission, % Award, Award Amount, Referrals Claimed, Referrals Authorised, and Dep IOS Amount. A context menu is open over the "Print (Ctrl+P)" icon in the browser's toolbar, with the "Export to PDF for printing" option highlighted. A blue callout box points to this option with the text: "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."

### 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

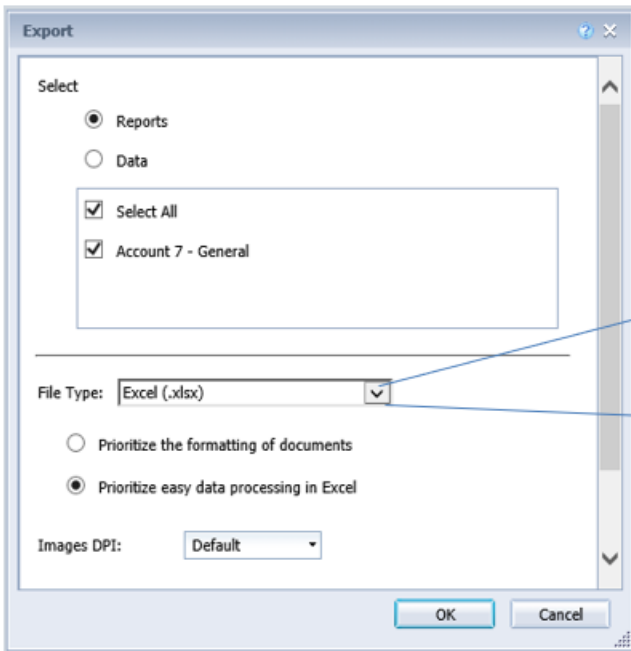
## 2. Export a report to your computer in PDF, Excel or CSV format

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

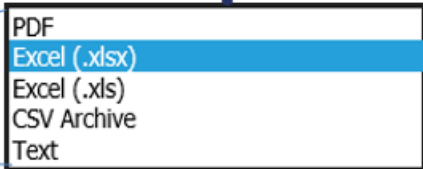


Click here to export the report. This pane found at the top of the report

Click here to refresh the report if you wish to re-run the report. This pane found at the top of the report



Select the file type from the dropdown and then click OK



Select After you have clicked OK, this prompt will appear at the bottom of your screen, allowing you to either open or save the file.





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

Dental Customer Service helpdesk on 0345 034 2458 or [nss.psddental@nhs.scot](mailto:nss.psddental@nhs.scot)