NSS
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eSchedules
A quick guide to your new system

Contents

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 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

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.

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
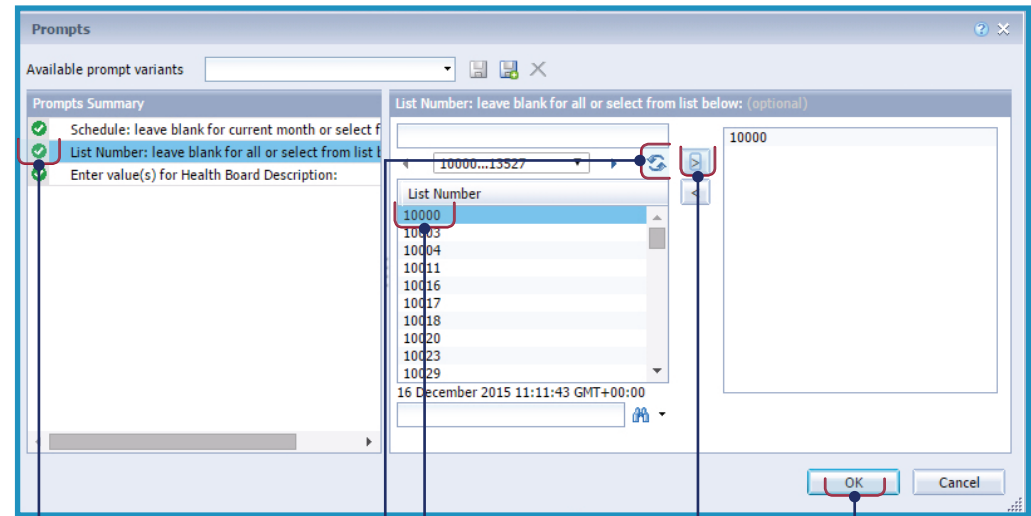• Superannuation Cumulative

Current schedule

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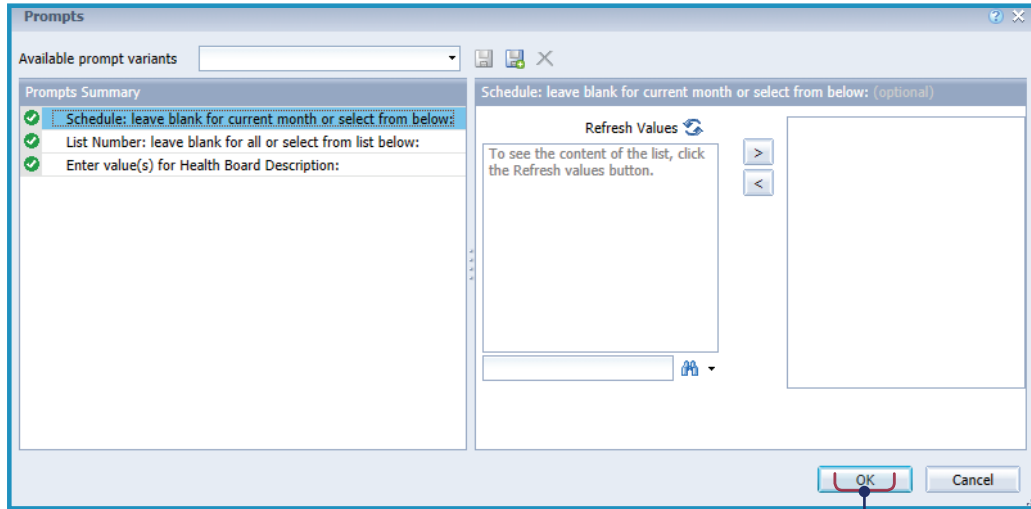
If you wish to run a current schedule for all eligible List Numbers you can view, simply click the OK button.

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.

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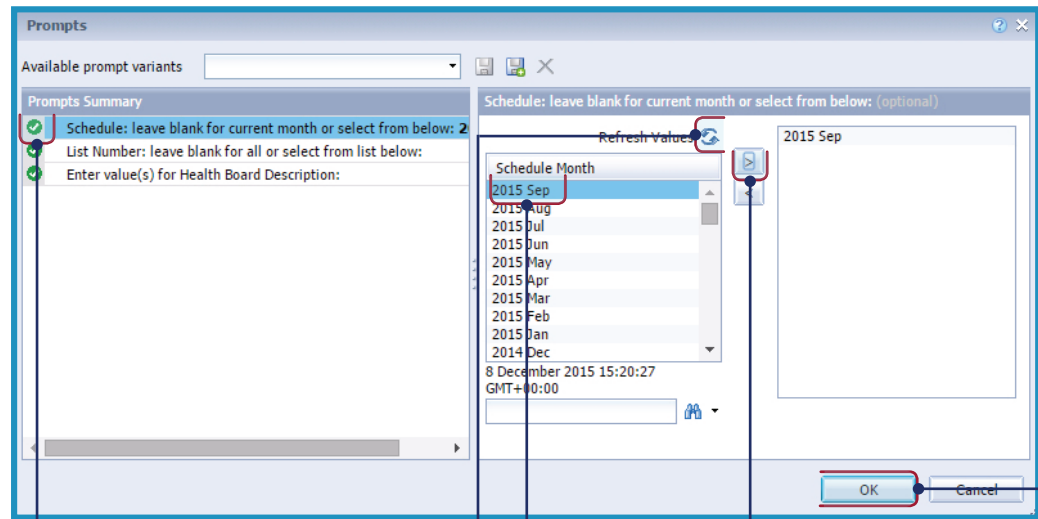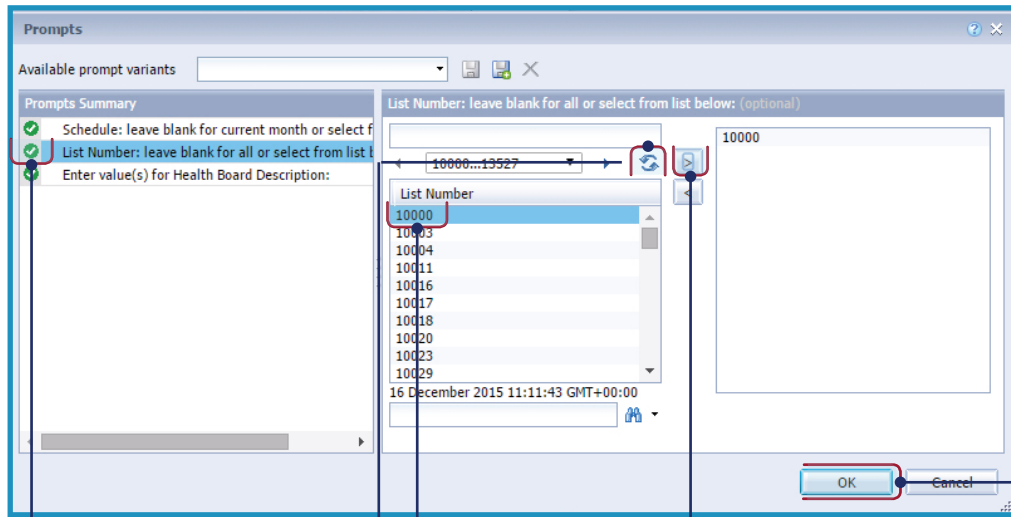
5 Click OK to run the report.

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.

Click on Schedule.
It will turn blue.

1

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

2

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

3

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

4

Click OK to run
the report.

5

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.

Click on List Number. It will turn blue.

1

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

2

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

3

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

4

Click OK to run the report.

5

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.

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.

Switch between reports by using the drop-down menus.

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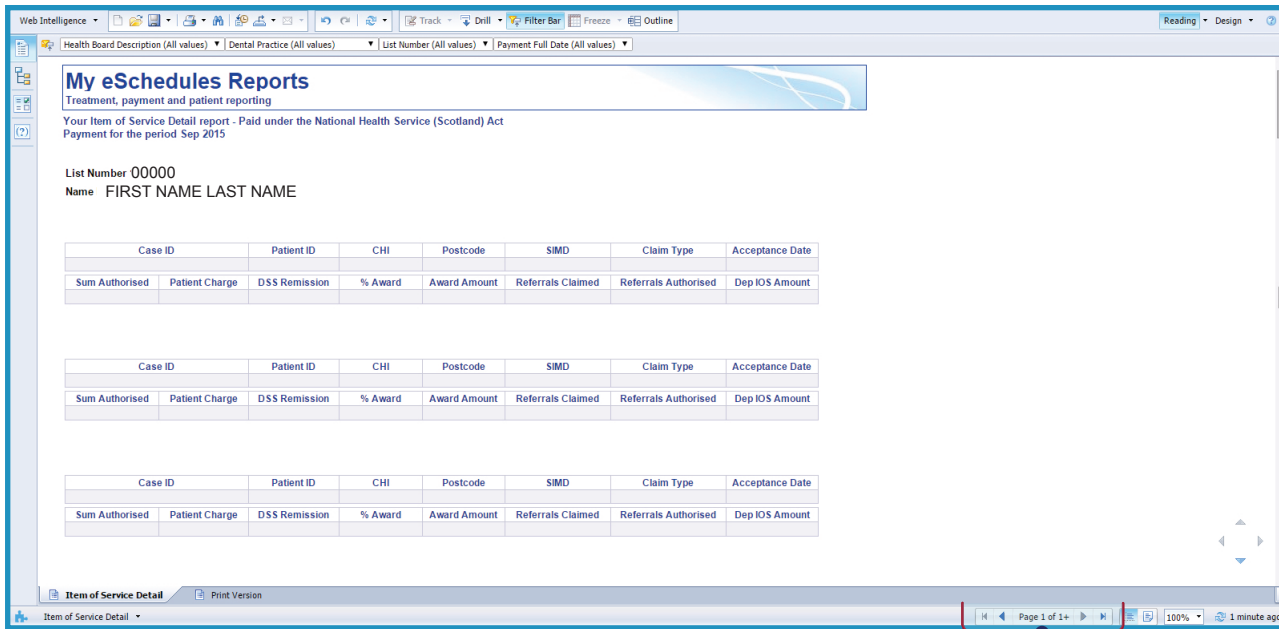
Use the forward and back arrows at the bottom of the page to change page.

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.

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.
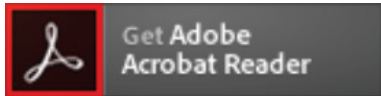
You can download the latest version of Adobe Reader for free at https://get.adobe.com/uk/reader/

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.
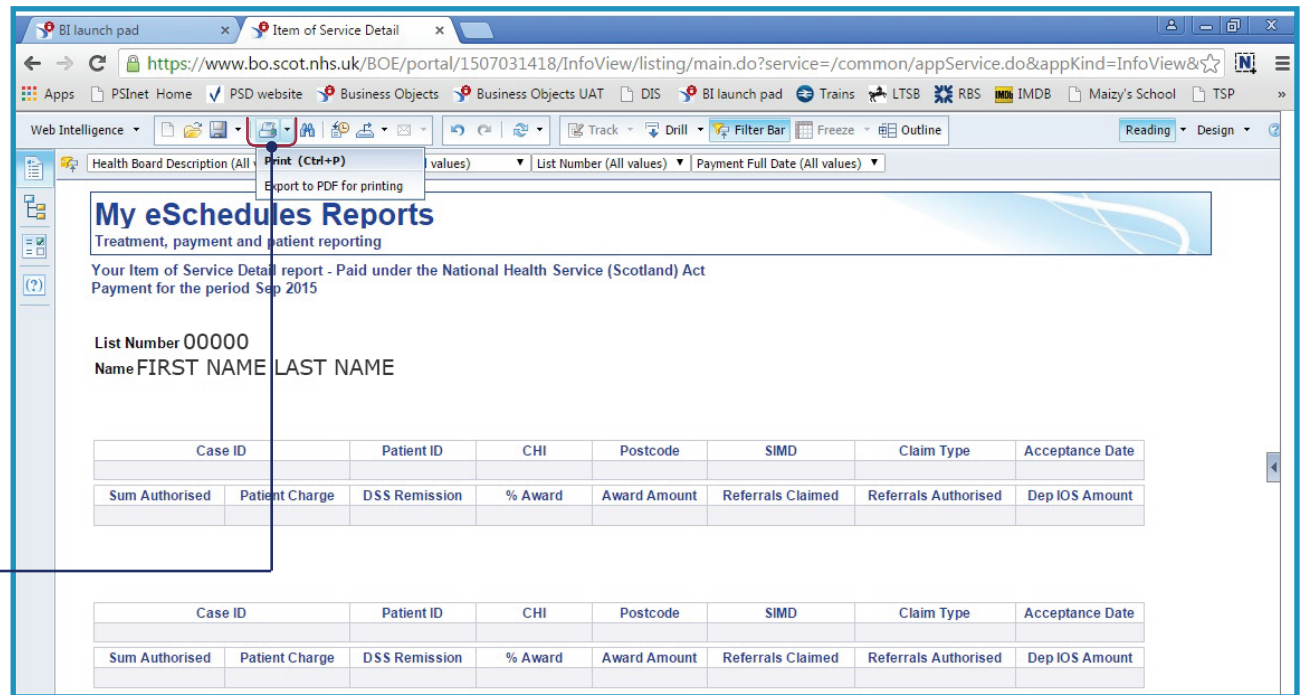
Note

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

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.

"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

Issues viewing, running or general report queries:
Dental Customer Service helpdesk on 0131 275 6300 or 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