NSS
Practitioner
Services

NHS National Services Scotland

Online Reporting

A quick guide to the Online Reporting system

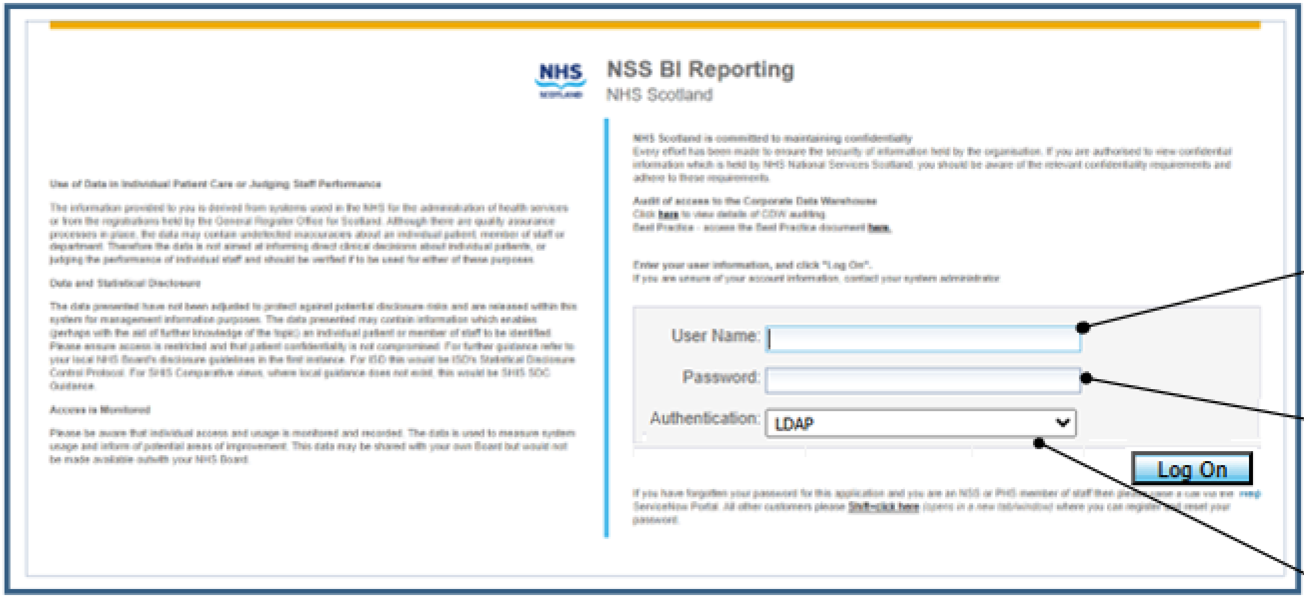
Contents

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.



Enter your username.
It must be in lowercase.

Enter your password.
This is one chosen by you.

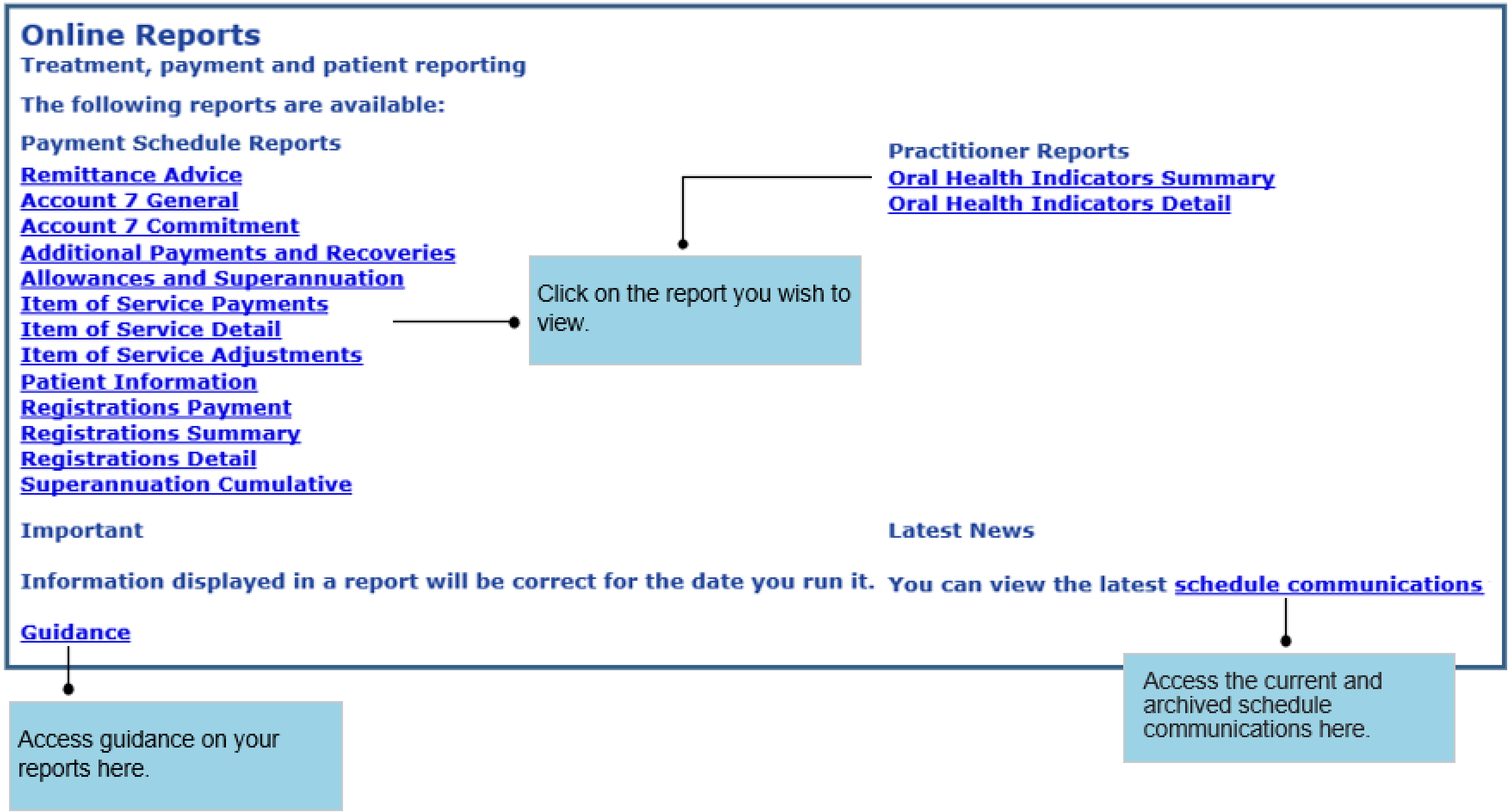
This field is pre-filled.
Do not remove or amend.

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

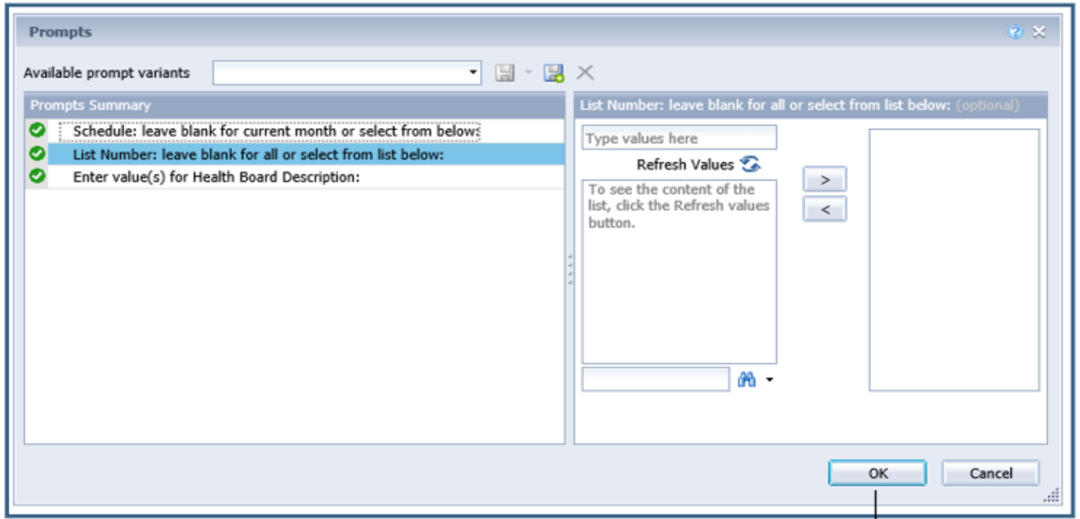
Non-standard reports

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

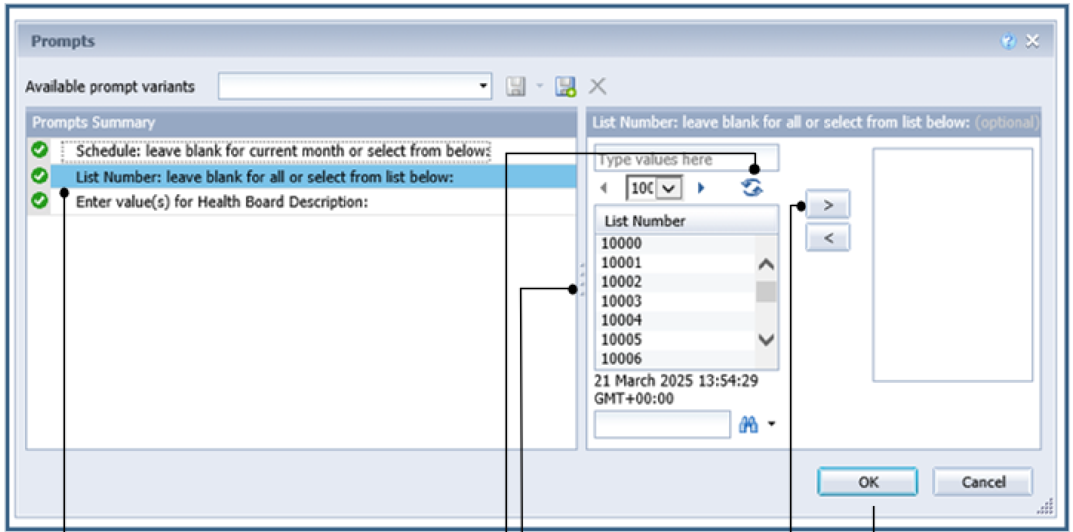
Current schedule

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.

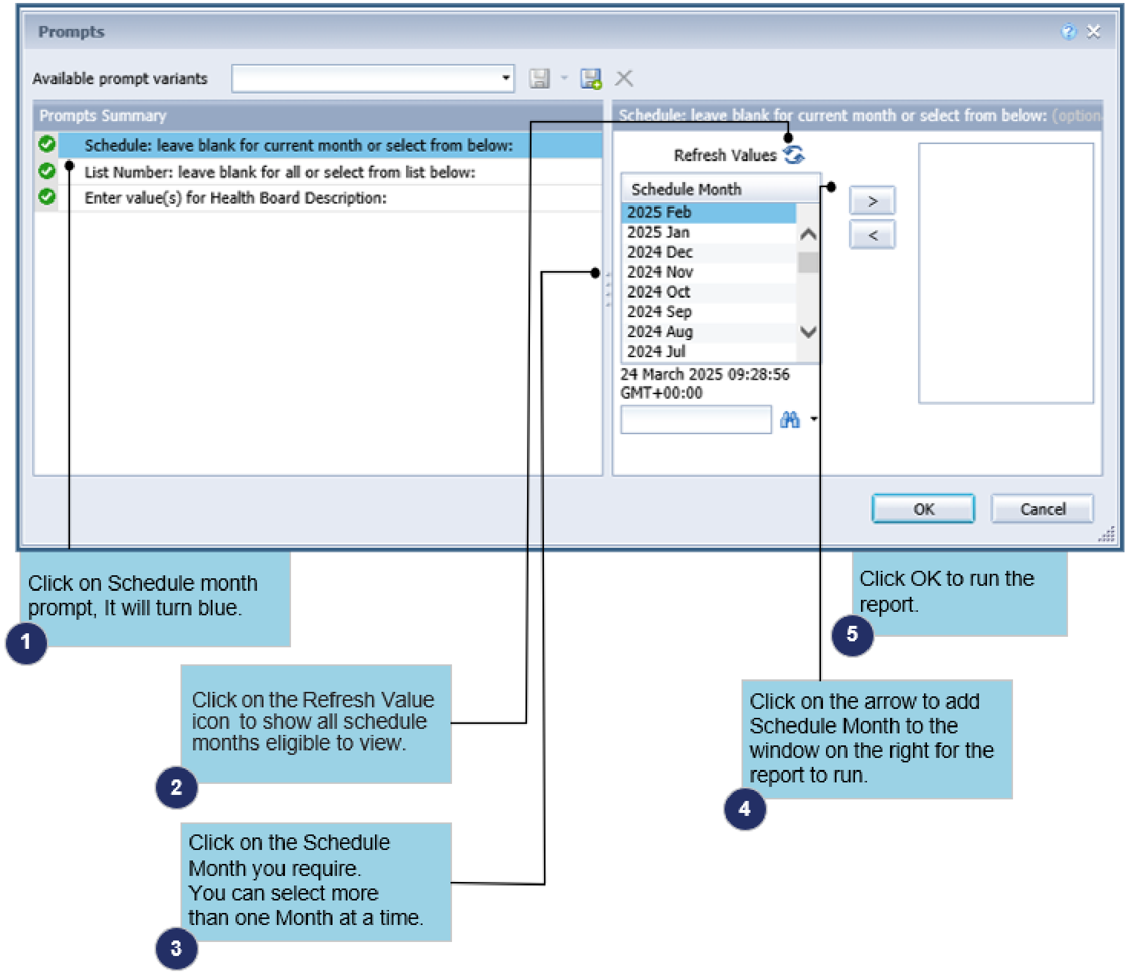
5 Click OK to run the report.

Running a historical report

You can view 6 years plus the current financial year.

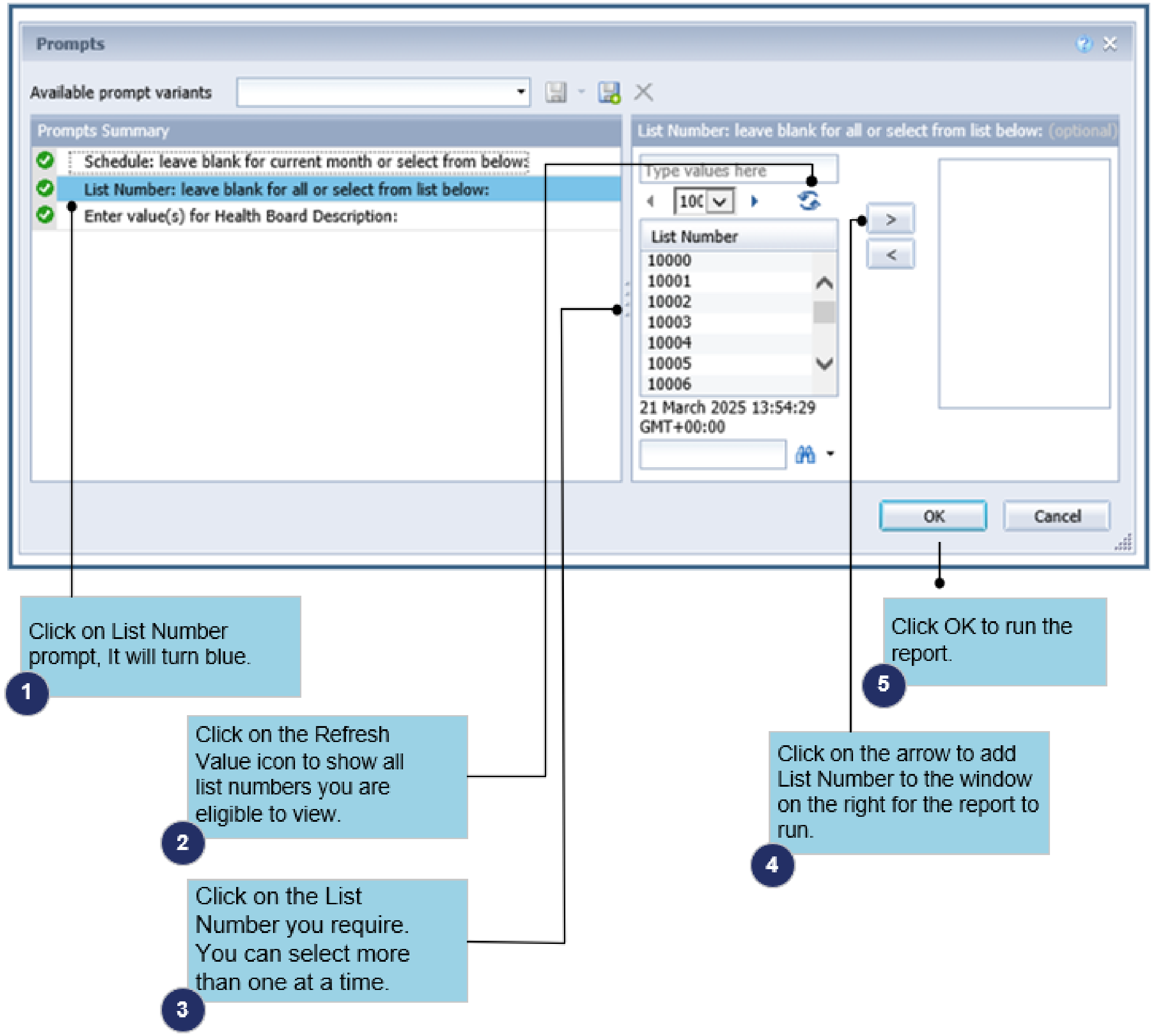
Note
Historical schedules are not available for the **Patient Information report.**

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



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.

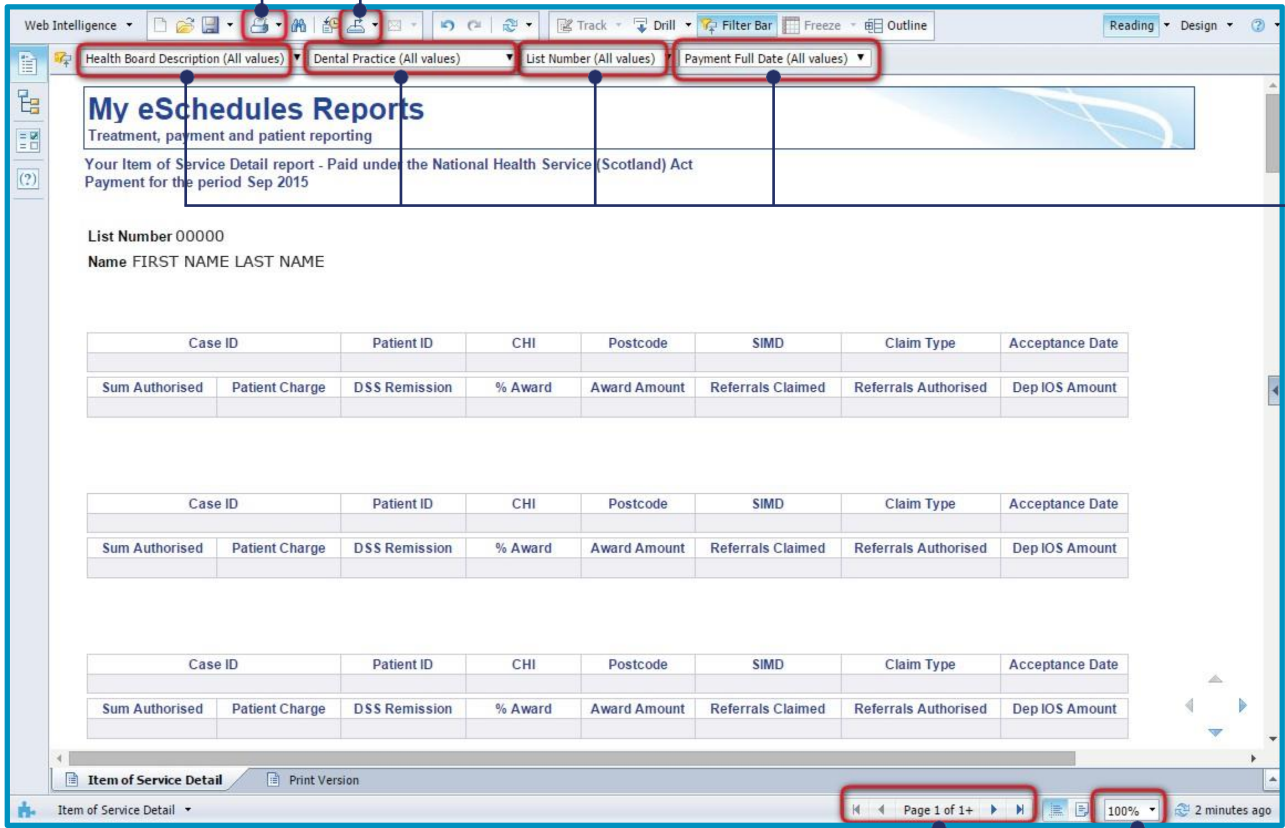


Navigating through your reports

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.

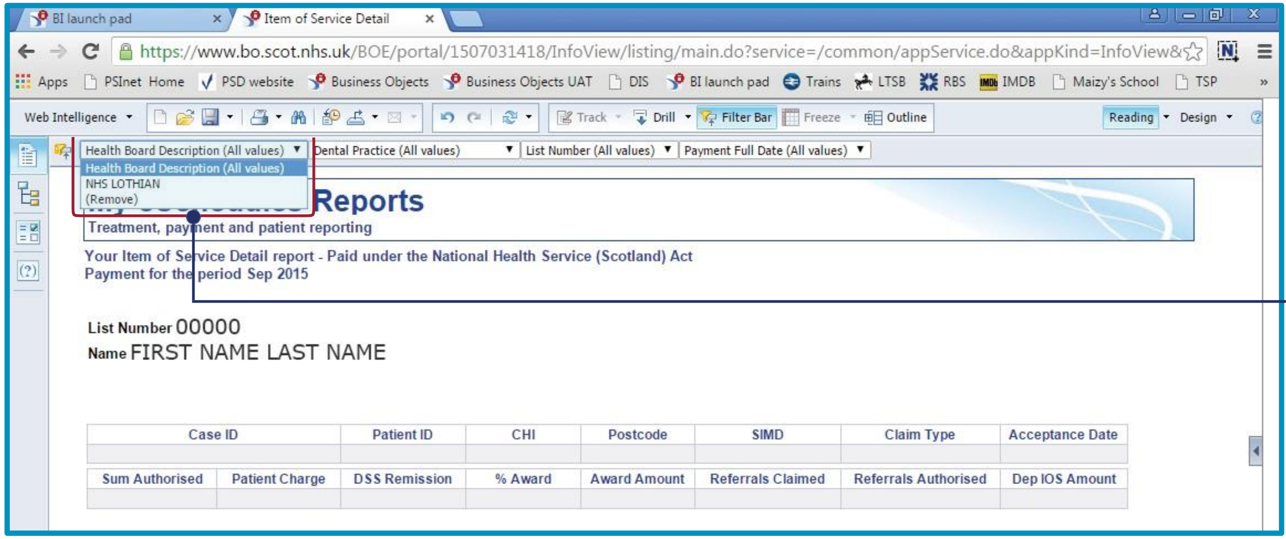
Switch between each of the pages of the report.

Change the size of the report.

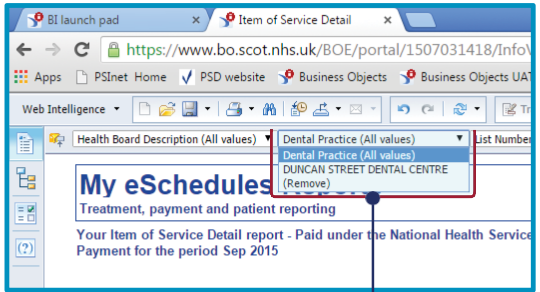
Report filters

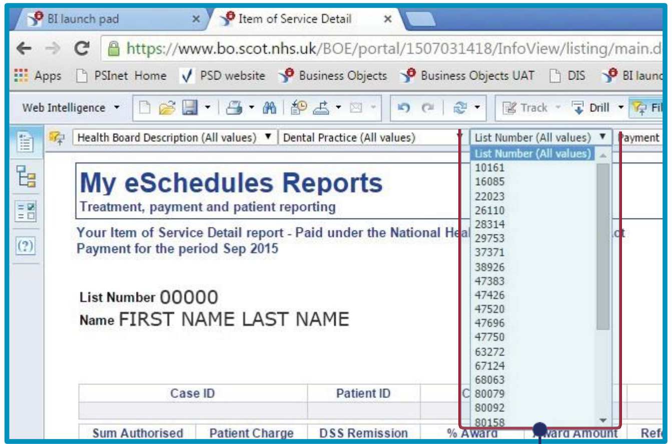
You can apply filters which will take you to the information you are looking for quickly. This is useful if you practice at multiple locations.

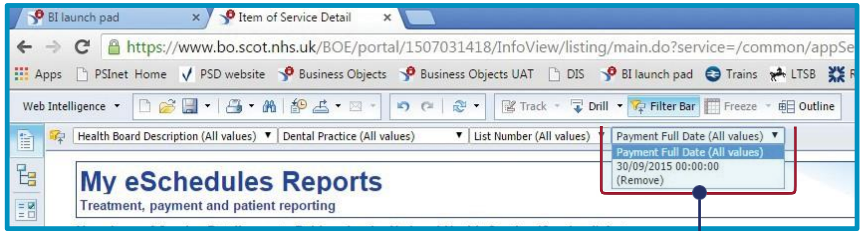
To remove filters, select the first option in the drop-down menu that has ‘all values’ in brackets. It is recommended that you do this if you wish to print or export a report for all list numbers.



Switch between reports by using the drop-down menus.



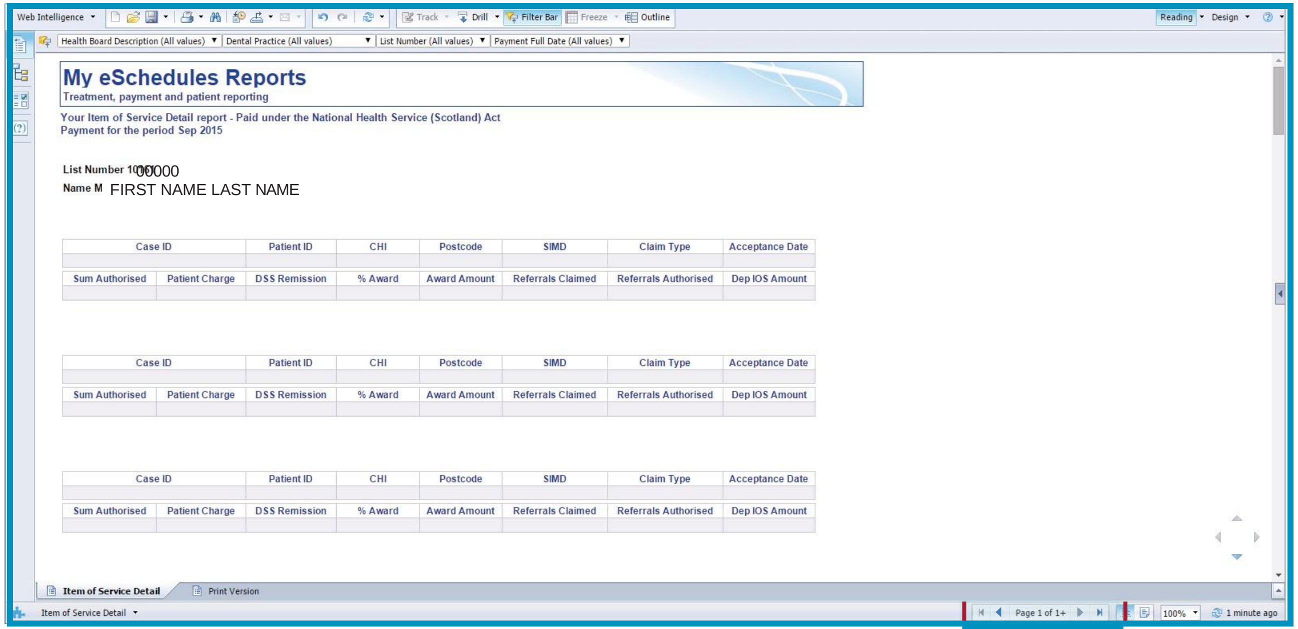




The other drop-down menus are shown here.

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.



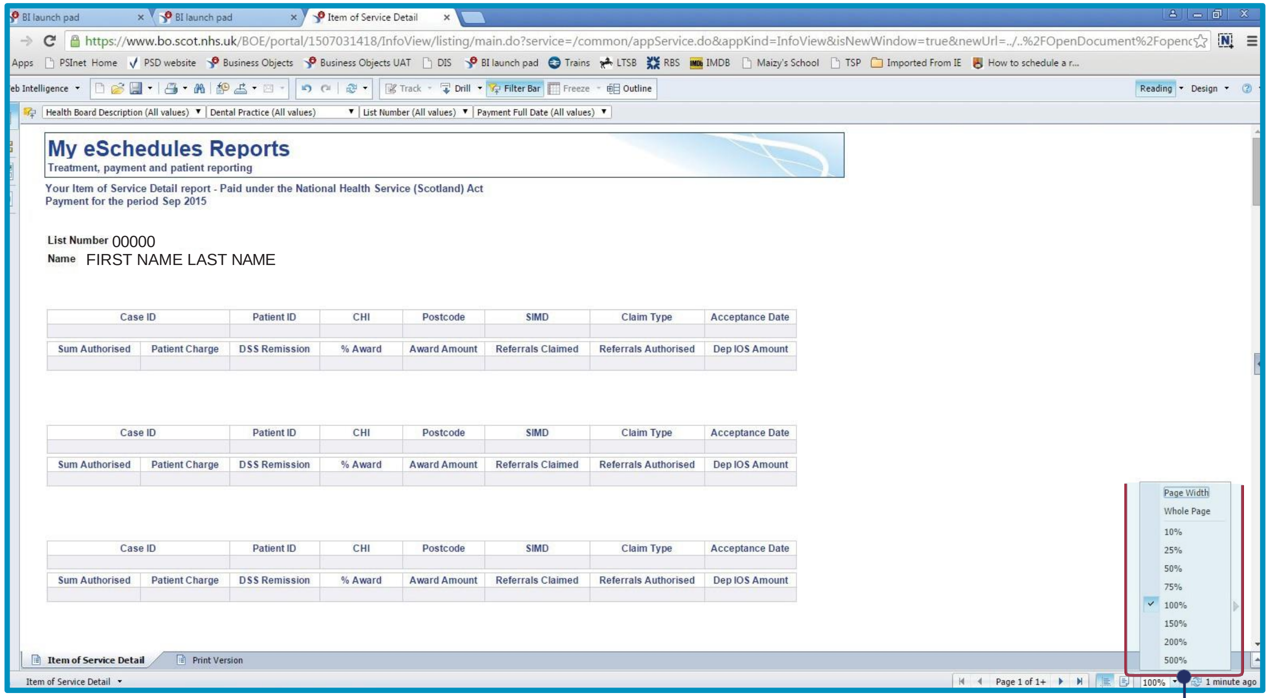
Use the forward and back arrows at the bottom of the page to change page.

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

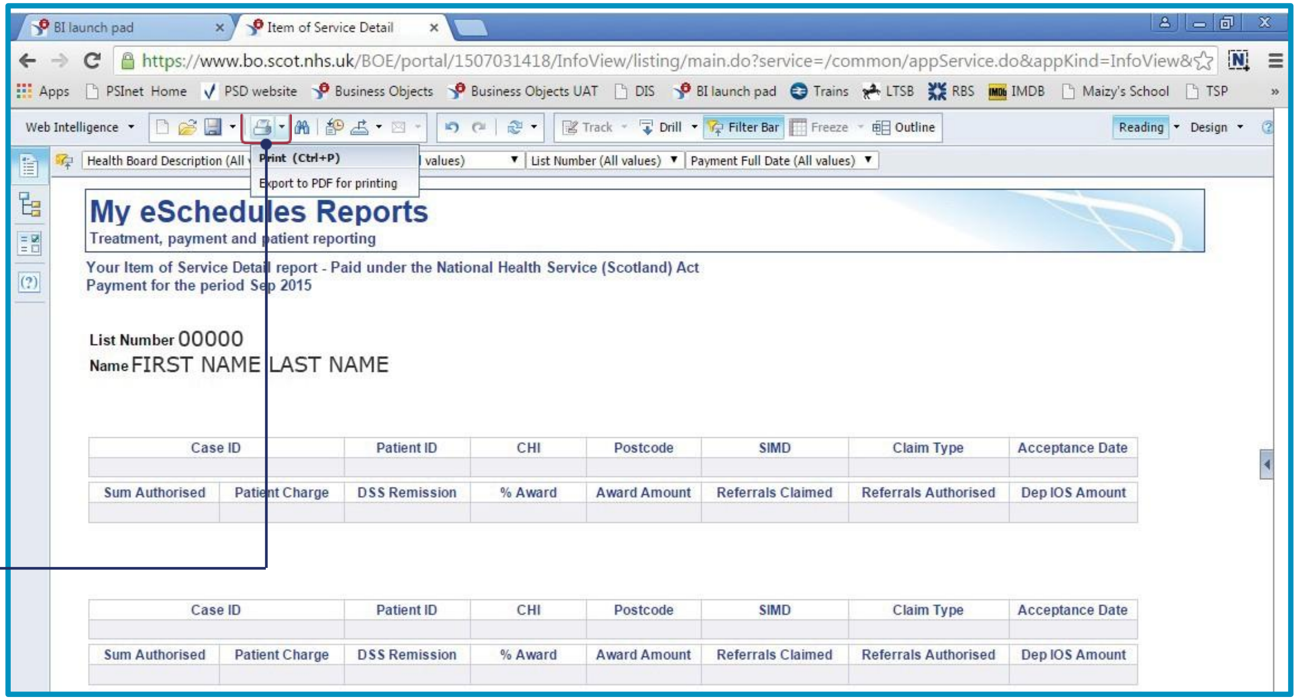
There are 2 ways in which you can do this.

1. 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.



Note

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

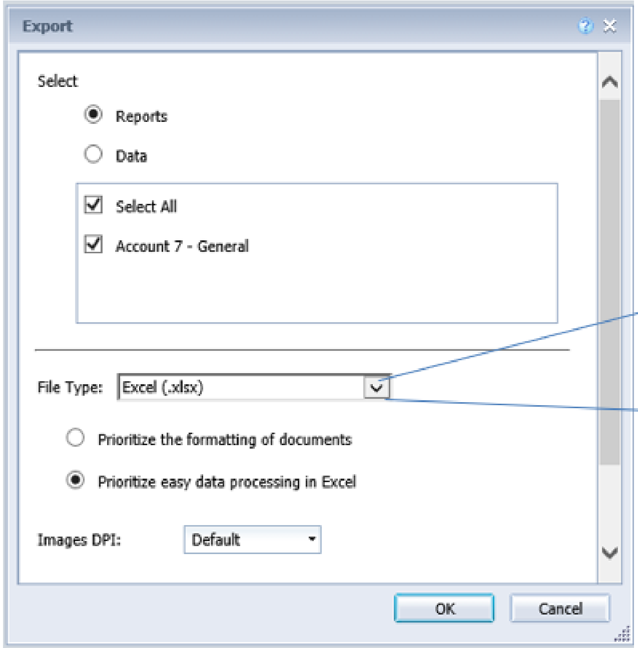
- Item of Service Detail Report
- Item of Service Adjustment Report
- Registration Detail Report

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

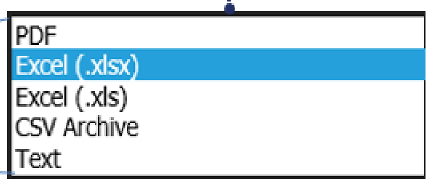
To export a report, you must have Microsoft Excel installed on your computer.

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.

Username 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 0345 034 2458 or nss.psddental@nhs.scot