

WebEDI Accounts

In this guide we'll show you how to:

- Create a WebEDI Account
- Reset a WebEDI Account password

Providers or practice staff will need to have Compass access with a 'Business Owner' role to be able to create a WebEDI Account.

Creating a WebEDI Account

Step 1: Log into the Compass system.

Please log in with your username and password below

Username

Password

Memorable Word

2nd

4th

6th

[Log In](#)

[NHS Choices Provider Login](#)

[Forgotten Password](#)

[Forgotten Memorable Word](#)

[Compass Guides](#)

[Dental Services](#)

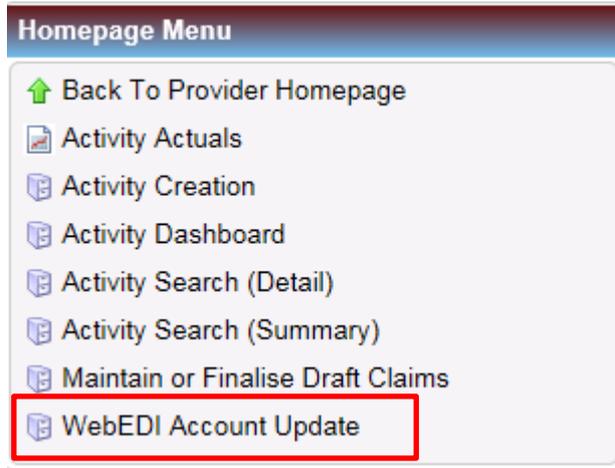
[Change Password](#) | [Change Memorable Word](#) | [FAQ](#) | [Cookie Usage](#)

Step 2: Click on the 'Activity' folder.

Homepage Menu

- My Profile
- User Maintenance
- Provider
- Contract
- Performer
- Payments
- Pensions
- Activity**
- Reporting
- Participant Update

Step 3: Click on the 'WebEDI Account Update' option



Step 4: You will then be presented with the screen below. Once you are on this screen, select the **Provider ID** you wish to create the WebEDI Account for in the top table.

The screenshot displays the 'NHS Dental Services' interface. At the top, it says 'provided by... Business Services Authority'. The main heading is 'DCS112 - WebEDI Account Update'. Below this is a 'Provider Entity' section with a search bar for 'Provider ID'. A table below it contains one record:

| Provider ID | Provider/Company Name | Provider Type Description | Company Registration Number | Address |
|-------------|-----------------------|---------------------------|-----------------------------|---|
| 190225 | MR AJ SCOTT-SMITH | Limited Company | 07436399 | Dental Surgery, Kirkby in Ashfield, SG5 4LY |

Below this table is a 'WebEDI Accounts' section with a search bar for 'Contact Name'. A table below it is currently empty:

| Contact Name | Email Address | Phone Number | Software Supplier | Site ID | Dailys Subscription Status | Active | Action |
|--------------|---------------|--------------|-------------------|---------|----------------------------|--------|--------|
|--------------|---------------|--------------|-------------------|---------|----------------------------|--------|--------|

Page navigation for both tables shows 'Page 1/1'.

Step 5: When you have selected the Provider ID, click on the 'Create' button which will now show on the right hand side between the two tables.

NHS Dental Services
provided by... NHS Business Services Authority

DCS112 - WebEDI Account Update

Home

Provider Entity

Search Provider ID

| Provider ID | Provider/Company Name | Provider Type Description | Company Registration Number | Address |
|-------------|-----------------------|---------------------------|-----------------------------|---|
| 190225 | MR AJ SCOTT-SMITH | Limited Company | 07436399 | Dental Surgery, Kirkby in Ashfield, SG5 4LY |

Records 1 to 1 of 1

WebEDI Accounts

Search Contact Name

Create

| Contact Name | Email Address | Phone Number | Software Supplier | Site ID | Dailys Subscription Status | Active | Action |
|--------------|---------------|--------------|-------------------|---------|----------------------------|--------|--------|
|--------------|---------------|--------------|-------------------|---------|----------------------------|--------|--------|

Records 0 to 0 of 0

Step 6: Enter the **performer number** of the WebEDI Account holder or select a performer using the magnifying glass.

Once this has been entered, select your EDI software supplier using the drop down list then click **'Submit'**.

Web EDI Account Request

Performer ID

Forename

Surname

Contact Number

Software Supplier

Step 7: You will then be taken to the WebEDI Account details page where you will need complete the following fields:

- **Location** – enter the location ID for the practice.
- **Software Version** – select the version for your EDI software system using the drop down list.
- **Daily Report Subscription Status** – The 'Daily Report' provides details of EDI subscription. Using the drop down list, select if you would like to subscribe to this report immediately or after the next payment run has passed.
 - *You should only subscribe to the Daily Report if your software system provides this service.*

Once completed, select the **WebEDI Contacts Details** tab at the top of the menu.

Web EDI Account Update ✕

WebEDI Account Details | WebEDI Contacts Details | Performer Details

Temp PIN Request

| | |
|----------------------------------|--|
| Provider/Company Name | MR AJ SCOTT-SMITH |
| Location | <input type="text"/> |
| Performer ID | 254983 |
| Username | <input type="text"/> |
| Password | <input type="text"/> |
| Contact Number | 12345678 |
| Software Supplier | Advanced Healthcare Computing |
| Software Version | 1.0 |
| Site ID | 40536 |
| Daily Report Subscription Status | Subscribed |
| Received Grant Application | <input type="checkbox"/> |
| Comments | <div style="border: 1px solid #ccc; height: 100px;"></div> |

Step 8: Click on the 'Create' button above the table to add a contact to the account.

The screenshot shows a web application window titled "Web EDI Account Update". It has three tabs: "WebEDI Account Details", "WebEDI Contacts Details" (which is selected), and "Performer Details". Below the tabs is a "Temp PIN Request" button. The main area is titled "Webedi Account Contacts Grid". It features a search bar with a dropdown menu set to "Title" and a search button. A "Create" button is highlighted with a red box. Below the search bar is a table with the following columns: Title, Forename, Surname, Job Title, Landline Phone, Email Address, Primary Contact, Active, and Action. The table is currently empty. At the bottom of the grid, it says "Records 0 to 0 of 0". There are navigation arrows and a "Page 1 / 1" indicator. At the bottom right of the window are "Save" and "Cancel" buttons.

Step 9: Complete the following mandatory fields and then click 'Save':

- Title
- Forename
- Surname
- Email Address

The screenshot shows a "Contact Details" form. It has a title bar with "Contact Details" and a close button. The form contains the following fields:

- Title: A dropdown menu with "Please select..." selected.
- Forename: A text input field highlighted in green.
- Surname: A text input field highlighted in green.
- Job Title: A text input field.
- Landline Phone: A text input field.
- Mobile Number: A text input field.
- Fax Number: A text input field.
- Email Address: A text input field highlighted in green.
- Primary Contact: A checkbox that is checked.

At the bottom right of the form are "Save" and "Cancel" buttons.

Step 10: Once the contact details have been saved you will be returned to the WebEDI Contacts Details tab.

Click the 'Save' button on this screen to create the account.

Web EDI Account Update

WebEDI Account Details | **WebEDI Contacts Details** | Performer Details

Temp PIN Request

WebEDI Account Contacts Grid

Search Title [] [] Create

| Title | Forename | Surname | Job Title | Landline Phone | Email Address | Primary Contact | Active | Action |
|-------|----------|---------|-----------|----------------|------------------------------|-----------------|--------|--------|
| Mr | John | Smith | | | johnsmith@dentalpractice.com | Y | Y | Edit |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

Records 1 to 1 of 1

Page 1 / 1

Save Cancel

Step 11: The WebEDI Account will now display in the bottom table on the screen.

To retrieve the username and password for the EDI system, as well as the practices EDI site number, click the **'Edit'** button next to the WebEDI Account.

NHS Dental Services provided by... NHS Business Services Authority

DCS112 - WebEDI Account Update

Home

Provider Entity

Search Provider ID [] []

| Provider ID | Provider/Company Name | Provider Type Description | Company Registration Number | Address |
|-------------|-----------------------|---------------------------|-----------------------------|---|
| 190225 | MR AJ SCOTT-SMITH | Limited Company | 07436399 | Dental Surgery, Kirkby in Ashfield, SG5 4LY |
| | | | | |
| | | | | |
| | | | | |

Records 1 to 1 of 1

WebEDI Accounts

Search Contact Name [] []

| Contact Name | Email Address | Phone Number | Software Supplier | Site ID | Dailys Subscription Status | Active | Action |
|----------------|---------------------------------|--------------|-------------------------------|---------|----------------------------|--------|--------|
| RAJBIR HASSOON | DCSSTransformation@capita.co.uk | 12345678 | Advanced Healthcare Computing | 42923 | Y | Y | Edit |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Records 1 to 1 of 1

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NHS Dental Services is a service provided by the NHS Business Services Authority

Step 12: You can find the username, password and EDI site number on this screen.

Web EDI Account Update

WebEDI Account Details | WebEDI Contacts Details | Performer Details

Temp PIN Request

Provider/Company Name: MR AJ SCOTT-SMITH

Location: [Empty]

Performer ID: 320749

Username: 20181121091320077

Password: tfs%o4M5CE@1

Contact Number: 12345678

Software Supplier: Advanced Healthcare Computing

Software Version: 1.0

Site ID: 42923

Daily Report Subscription Status: Subscribed

Received Grant Application:

Comments: [Empty]

Save Cancel

Reset a WebEDI Account password

Step 1: Log into the Compass system.

NHS

Dental Services

Please log in with your username and password below

Username: [Empty]

Password: [Empty]

Memorable Word: [Empty] 2nd, [Empty] 4th, [Empty] 6th

Log In

NHS Choices Provider Login

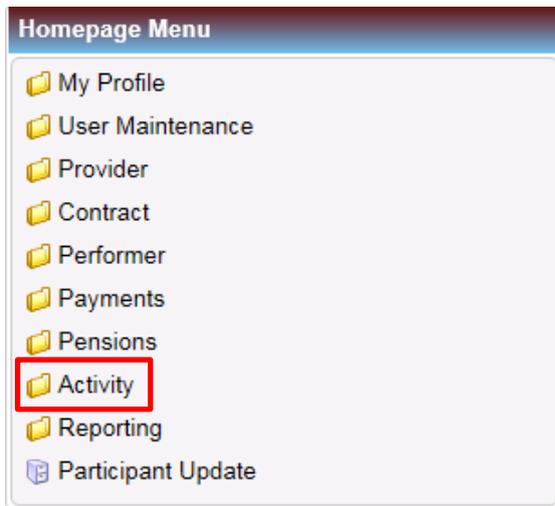
Forgotten Password

Forgotten Memorable Word

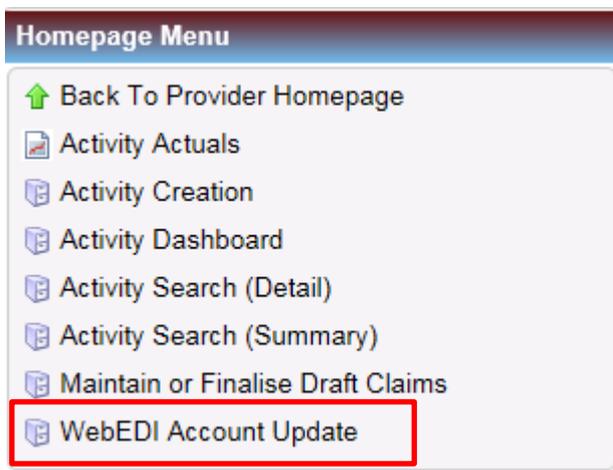
Compass Guides

Change Password | Change Memorable Word | FAQ | Cookie Usage

Step 2: Click on the 'Activity' folder.



Step 3: Click on the 'WebEDI Account Update' option



Step 4: You will then be presented with the screen below. Once you are on this screen, select the **Provider ID** you wish to reset the WebEDI Account password for in the top table.

NHS Dental Services provided by... Business Services Authority NHS

DCS112 - WebEDI Account Update

Home

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|--------------|---------------|--------------|-------------------|---------|----------------------------|--------|--------|
|--------------|---------------|--------------|-------------------|---------|----------------------------|--------|--------|

Records 0 to 0 of 0

Step 5: When you have selected the Provider ID, the WebEDI account will appear in the bottom table.

To reset the password for this account, click on the drop down arrow on the right hand side of the 'Edit' button and select '**Reset Password**'.

NHS Dental Services provided by... Business Services Authority NHS

DCS112 - WebEDI Account Update

Home

Provider Entity

Search Provider ID

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Records 1 to 1 of 1

WebEDI Accounts

Search Contact Name

| Contact Name | Email Address | Phone Number | Software Supplier | Site ID | Dailys Subscription Status | Active | Action |
|----------------|---------------------------------|--------------|-------------------------------|---------|----------------------------|--------|------------------------|
| RAJBIR HASSOON | DCSSTransformation@capita.co.uk | 12345678 | Advanced Healthcare Computing | 42923 | Y | Y | Edit Reset Password |

Records 1 to 1 of 1

Step 6: To view the new password, select the **'Edit'** button to display the WebEDI Account.

Web EDI Account Update ✕

WebEDI Account Details | WebEDI Contacts Details | Performer Details

Temp PIN Request

| | |
|----------------------------------|---|
| Provider/Company Name | MR AJ SCOTT-SMITH |
| Location | <input type="text"/> |
| Performer ID | 320749 |
| Username | 20181121091320077 |
| Password | t£s%o4M5CE@1 |
| Contact Number | 12345678 |
| Software Supplier | Advanced Healthcare Computing |
| Software Version | 1.0 |
| Site ID | 42923 |
| Daily Report Subscription Status | Subscribed |
| Received Grant Application | <input type="checkbox"/> |
| Comments | <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> |