WebEDI Accounts

In this guide we'll show you how to:

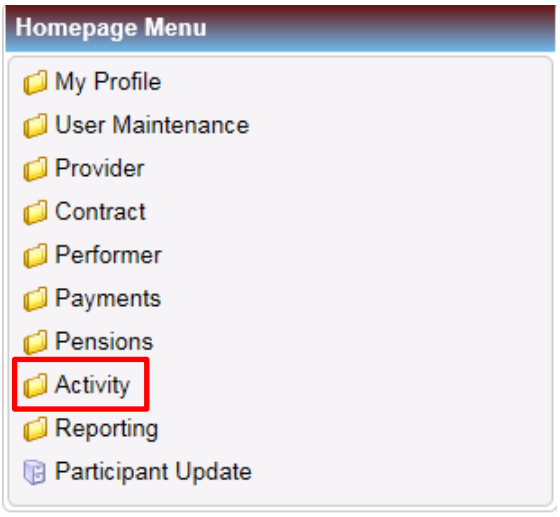
- Create a WebEDI Account
- Reset a WebEDI Account password

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

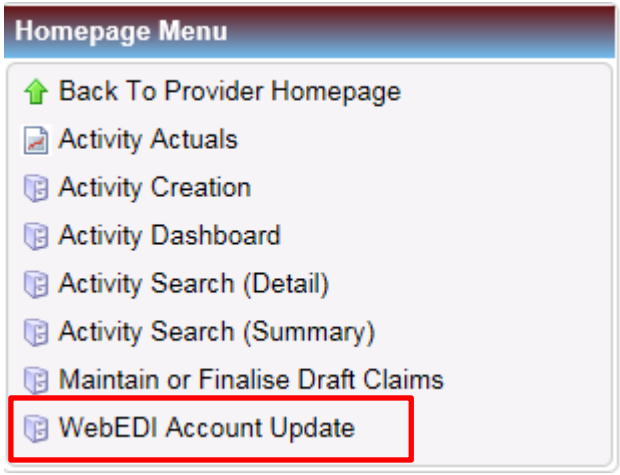
Creating a WebEDI Account

Step 1: Log into the Compass system.

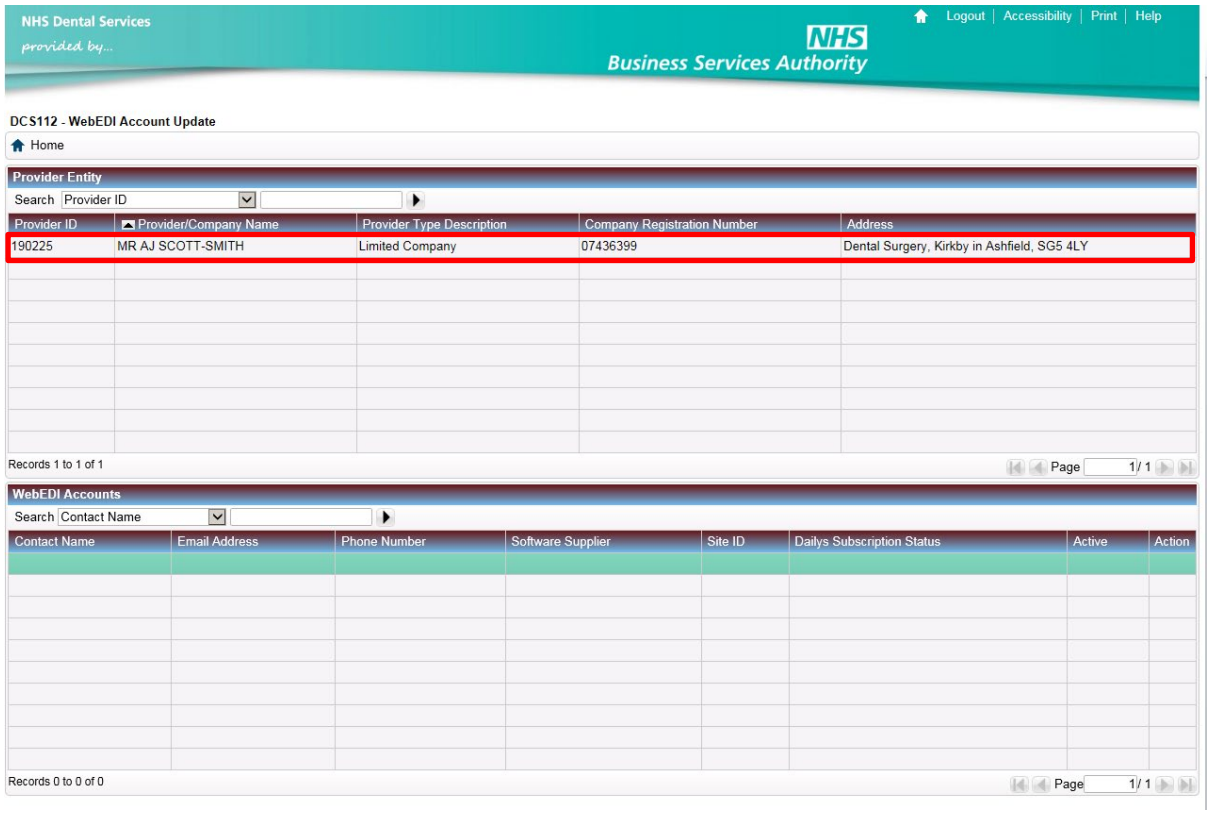
Step 2: Click on the **'Activity'** folder.



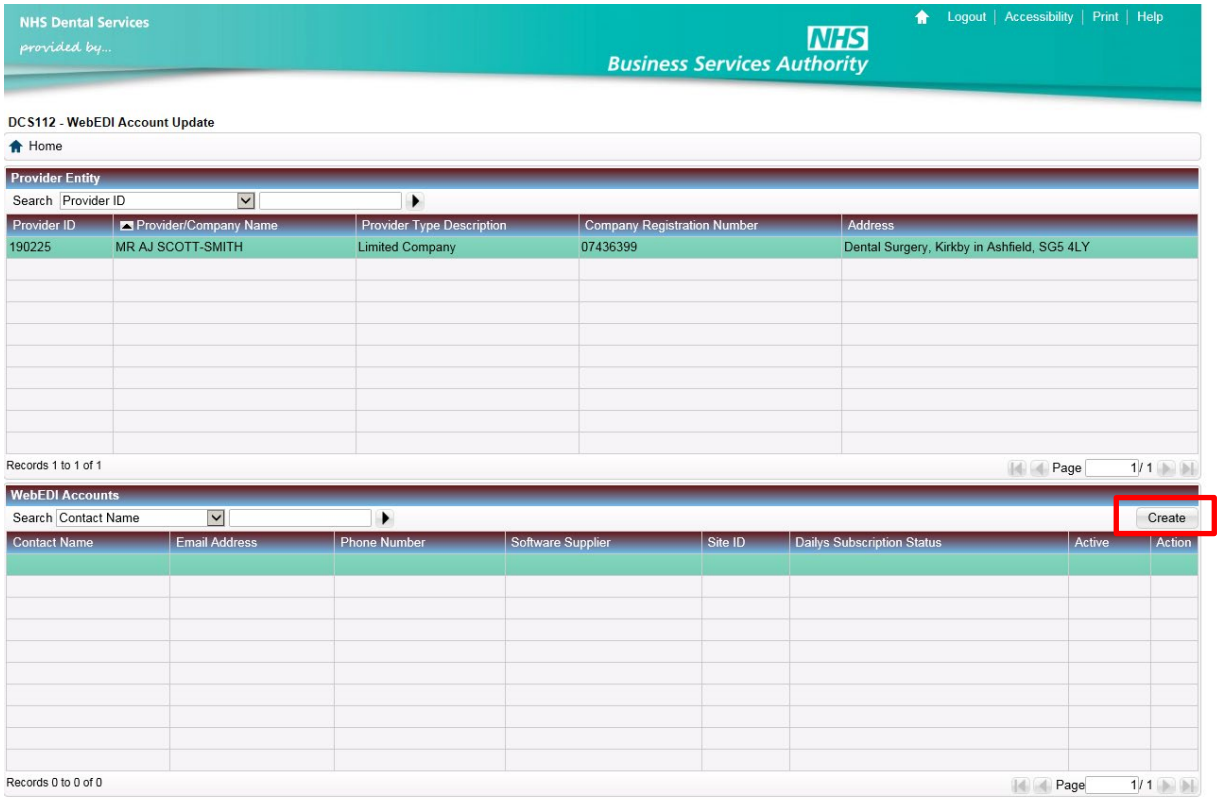
Step 3: Click on the **'WebEDI Account Update'** option



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

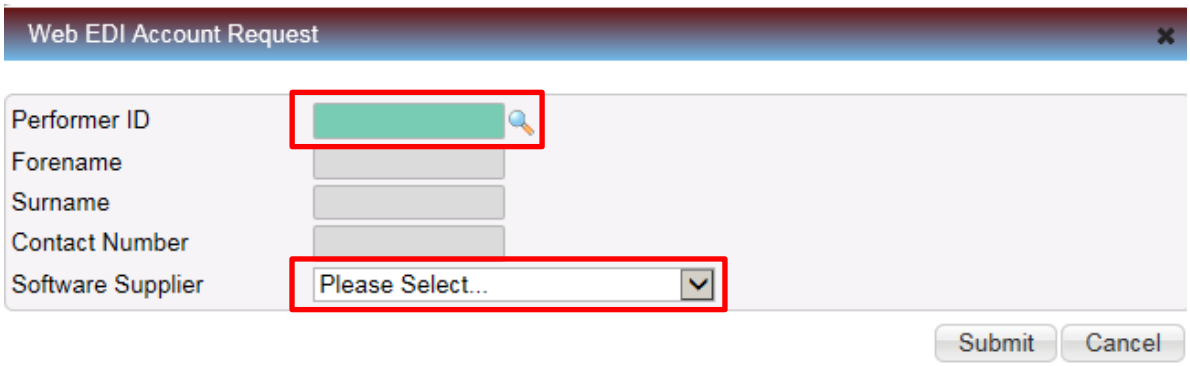


Step 5: When you have selected the Provider ID, click on the **'Create'** button which will now show on the right hand side between the two tables.



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

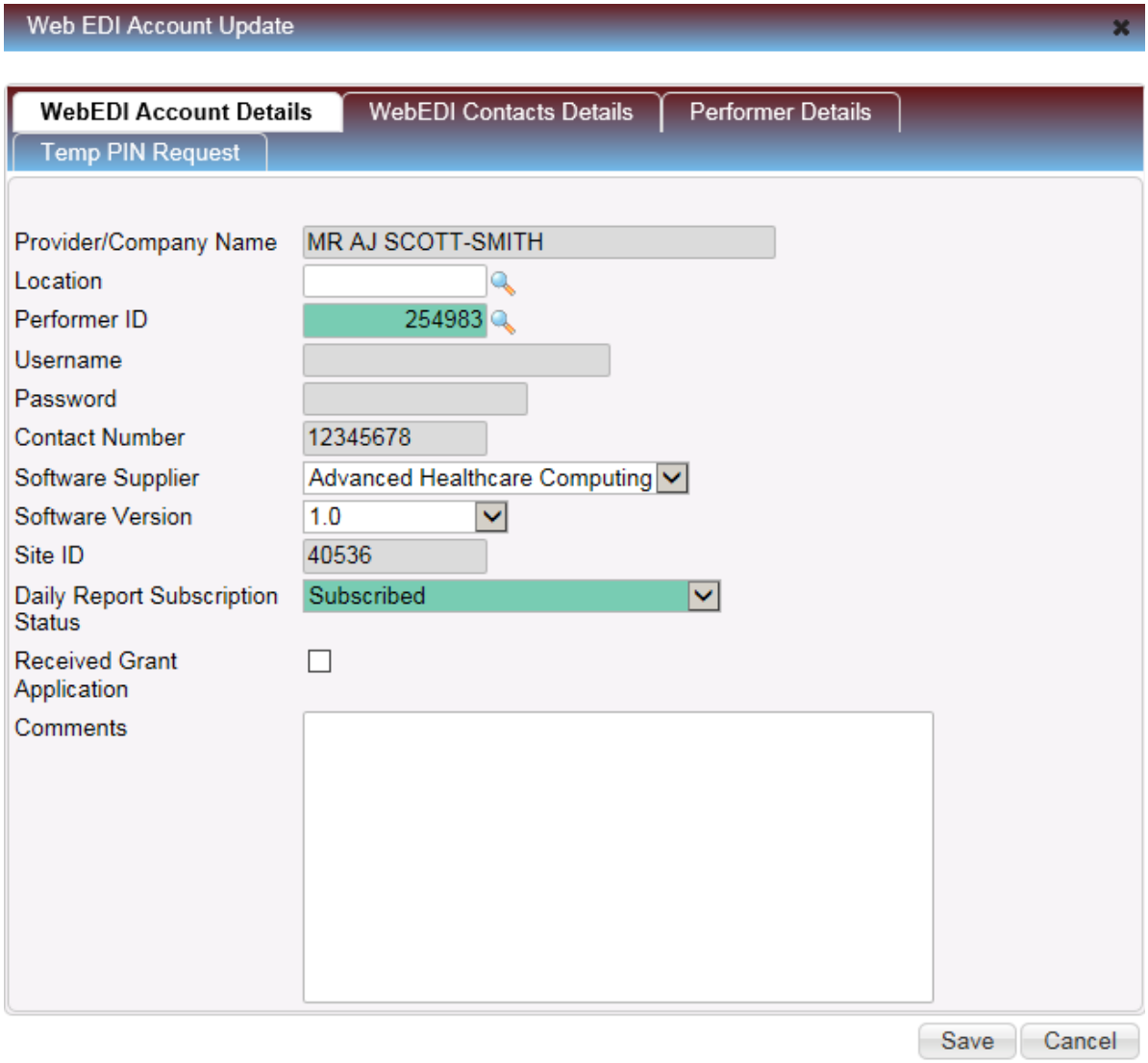
Once this has been entered, select your EDI software supplier using the drop down list then click **'Submit'**.



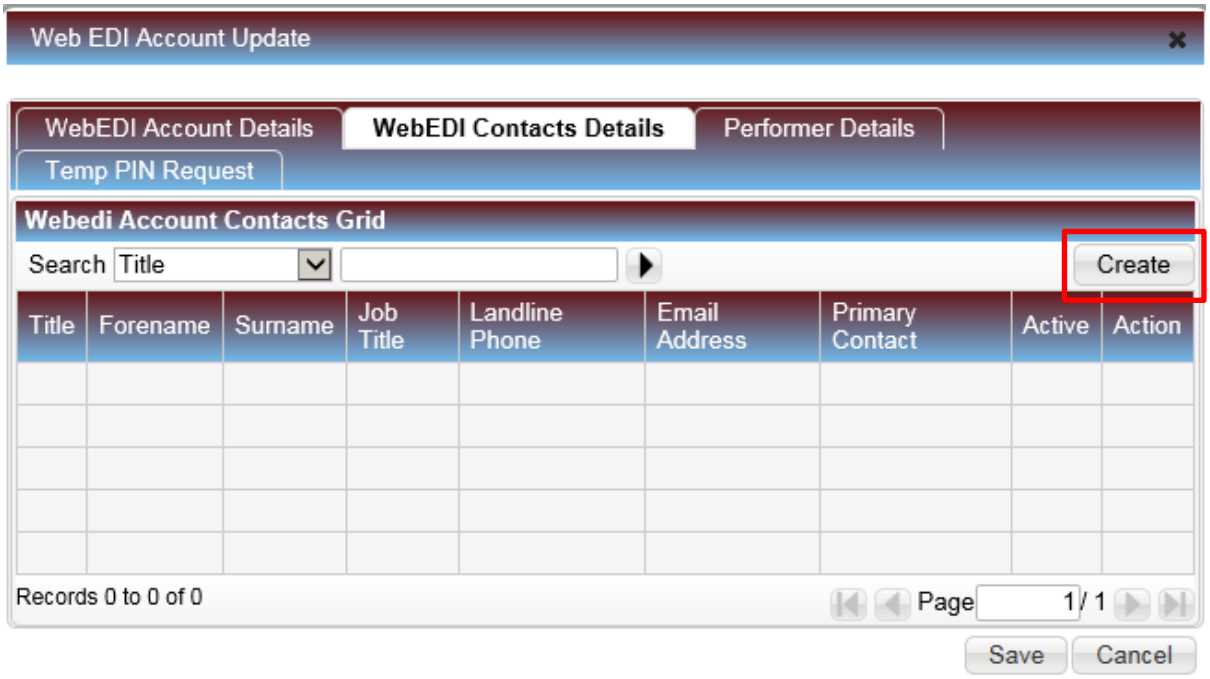
Step 7: You will then be taken to the WebEDI Account details page where you will need complete the following fields:

- **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.

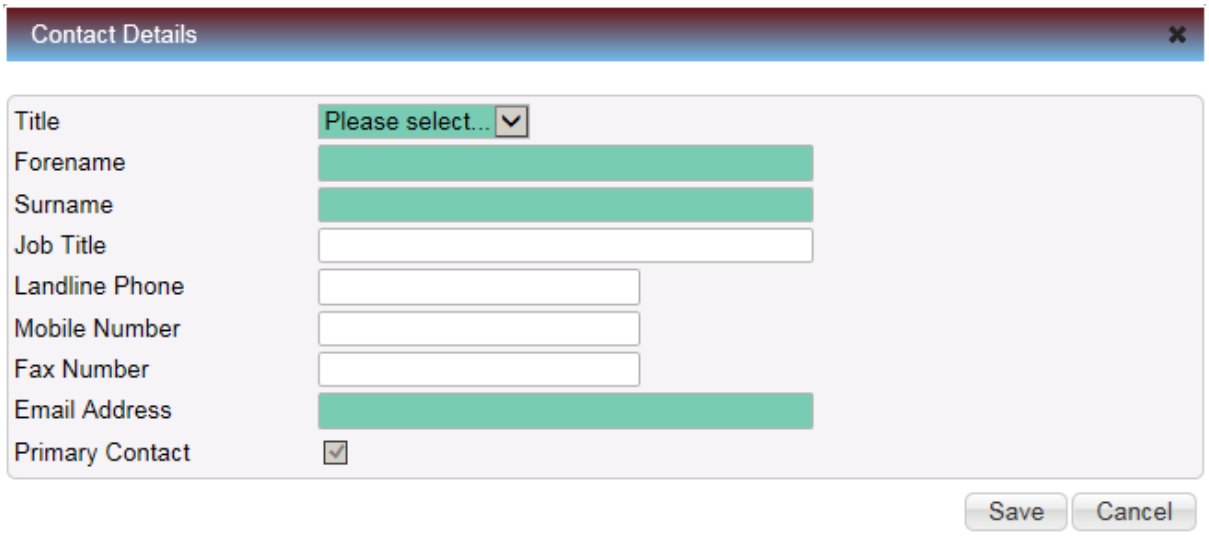


Step 8: Click on the **'Create'** button above the table to add a contact to the account.



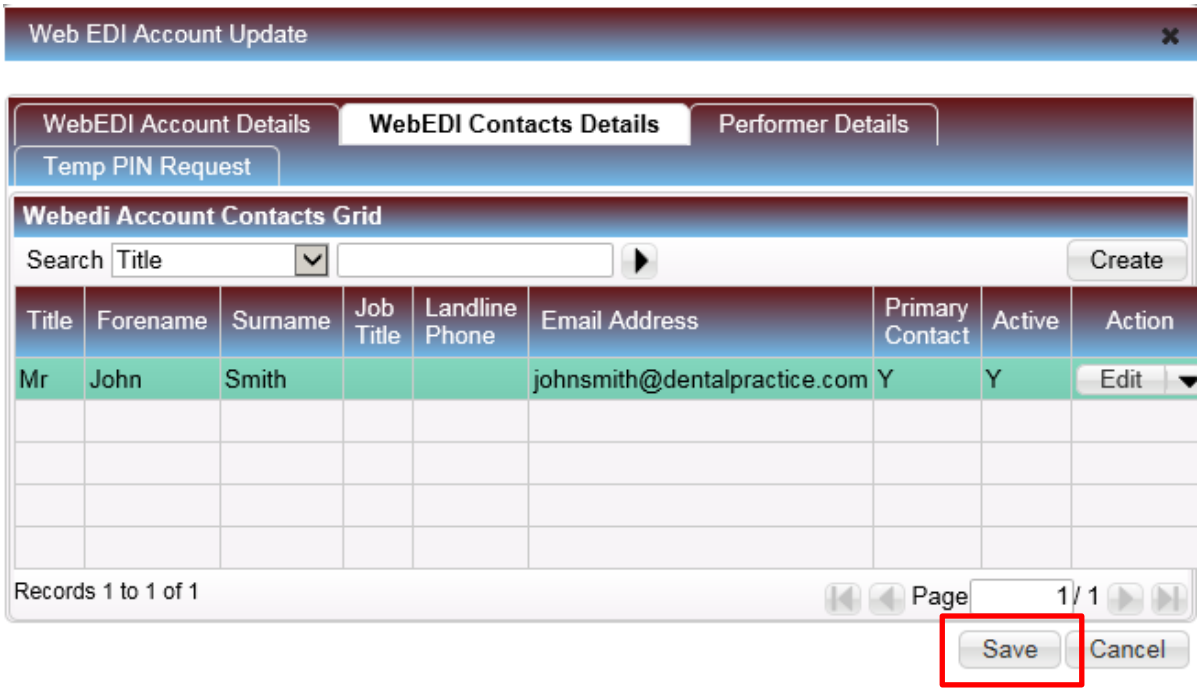
Step 9: Complete the following mandatory fields and then click **'Save'**:

- Title
- Forename
- Surname
- Email Address



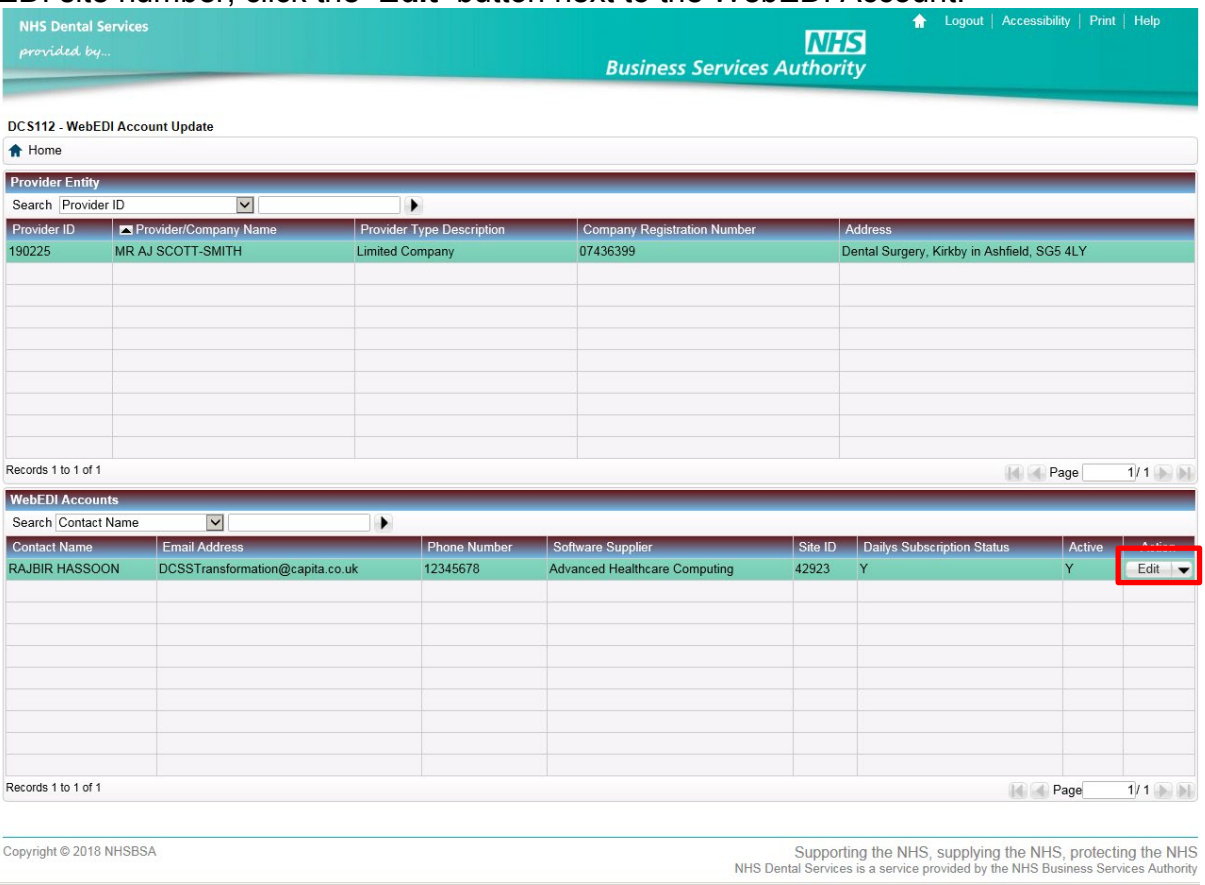
Step 10: Once the contact details have been saved you will be returned to the WebEDI Contacts Details tab.

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

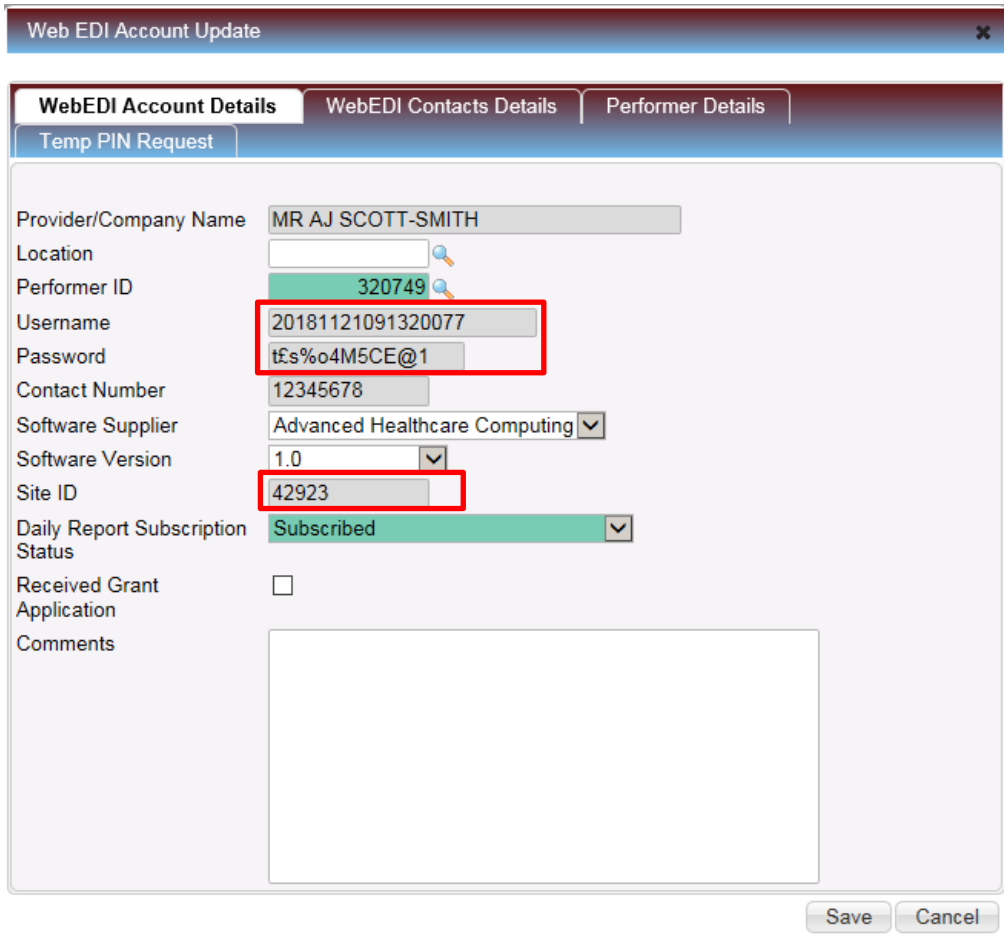


Step 11: The WebEDI Account will now display in the bottom table on the screen.

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.



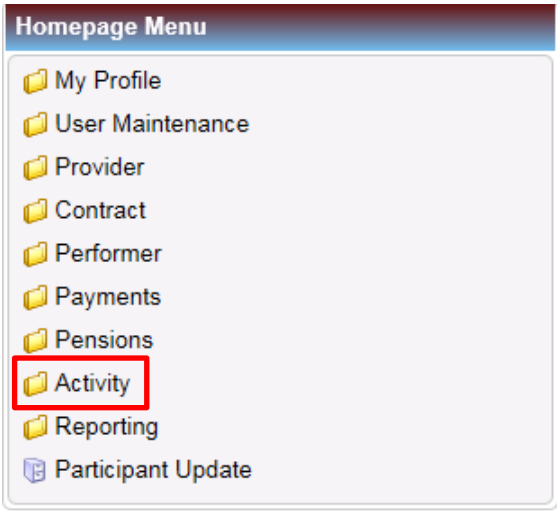
Step 12: You can find the username, password and EDI site number on this screen.



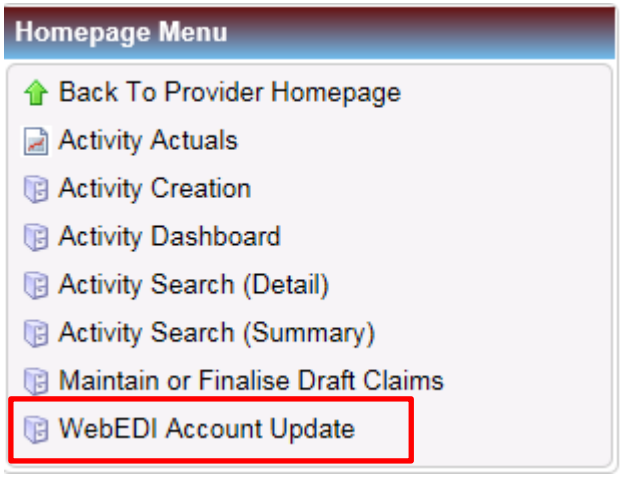
Reset a WebEDI Account password

Step 1: Log into the Compass system.

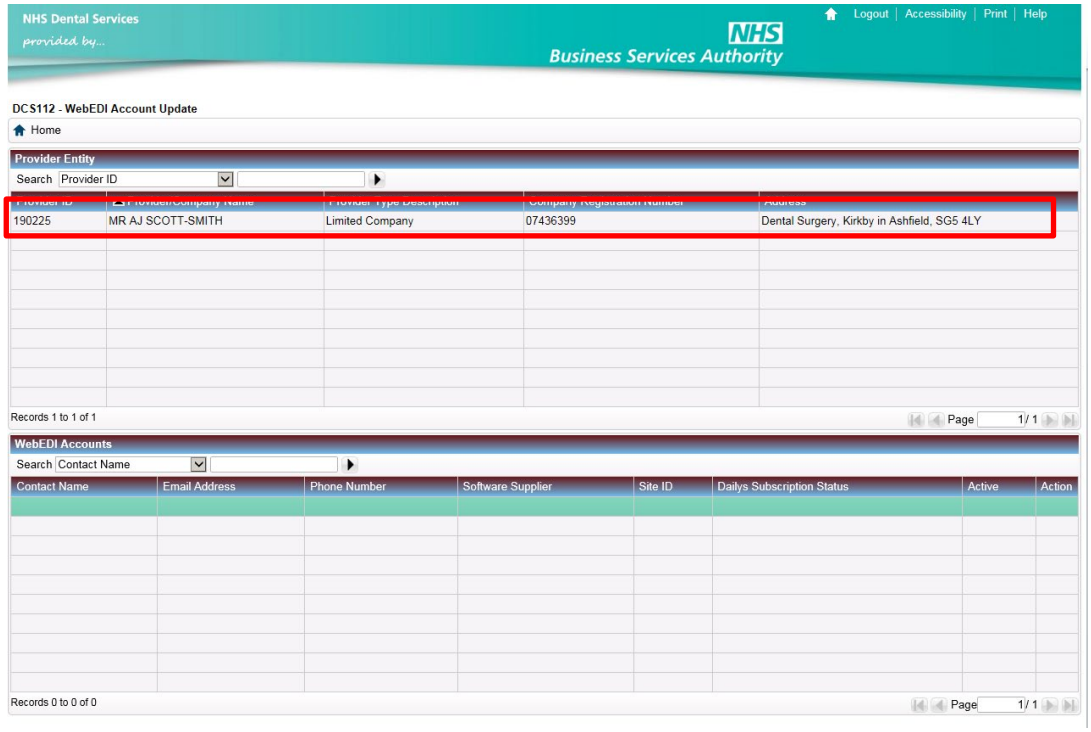
Step 2: Click on the **'Activity'** folder.



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

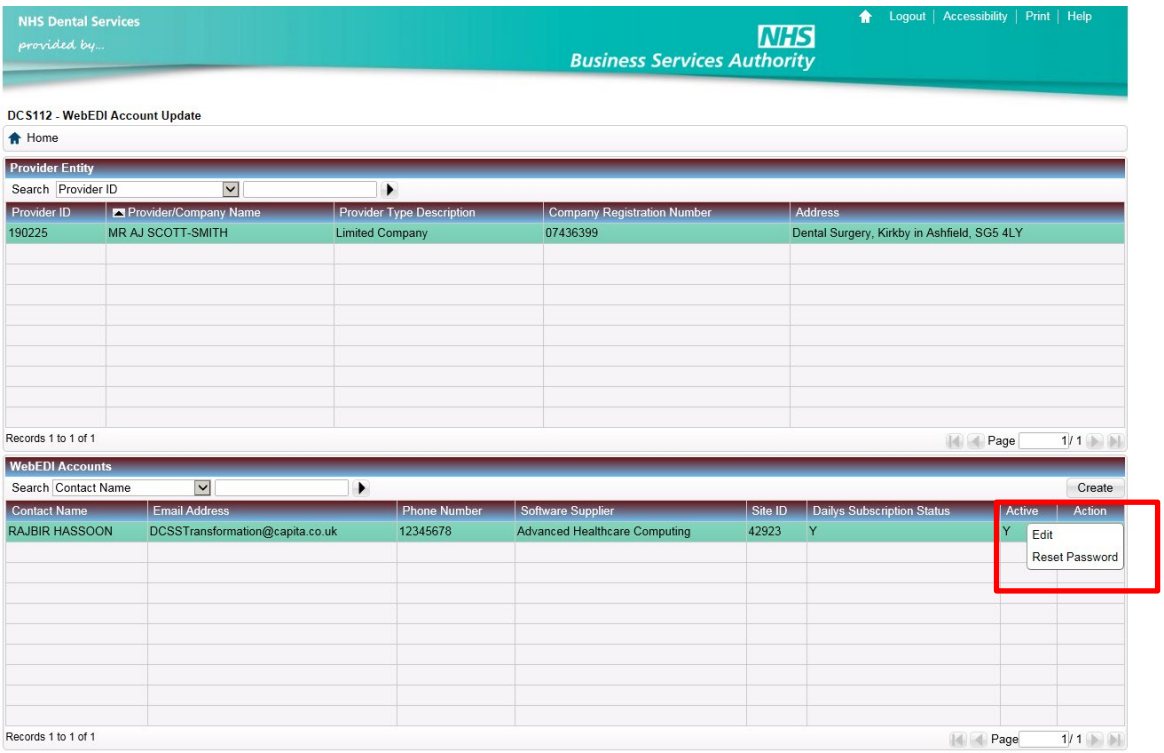


Step 4: You will then be presented with the screen below. Once you are on this screen, select the **Provider ID** you wish to reset the WebEDI Account password for in the top table.

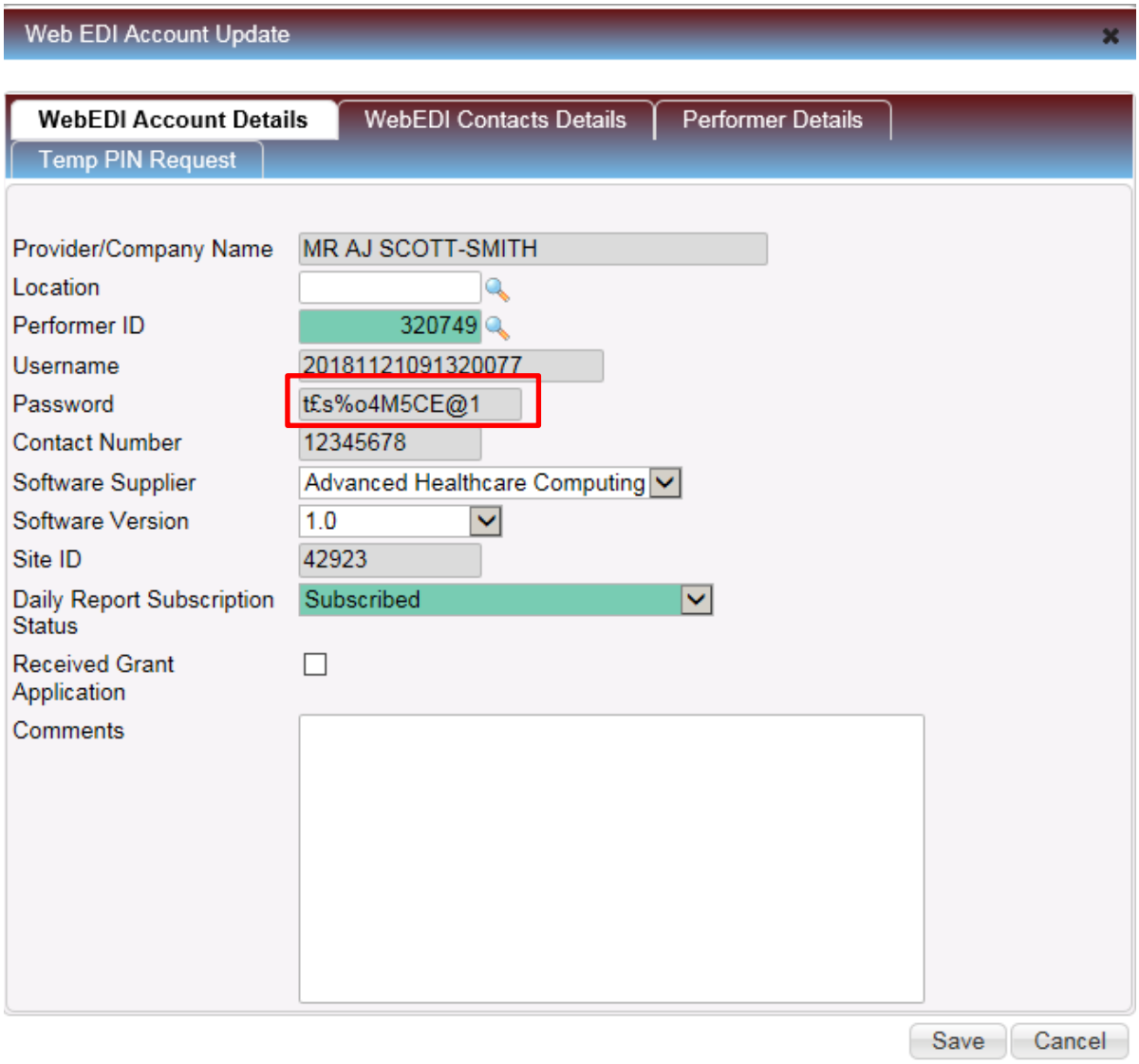


Step 5: When you have selected the Provider ID, the WebEDI account will appear in the bottom table.

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'**.



Copyright © 2018 NHSBSA

Supporting the NHS, supplying the NHS, protecting the NHS
NHS Dental Services is a service provided by the NHS Business Services Authority

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