

NHSmail - Leavers and joiners management

User and Local Administrator Guidance

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Overview

This is a guidance document and outlines the actions that users and local administrators should take in relation to NHSmail accounts when a user joins and/or leaves an organisation.

How does the ‘leaver’ and ‘joiner’ process work on the service?

All accounts on the NHSmail service are assigned to an owning organisation and follow the account lifecycle as detailed in the [NHSmail information management policy](#). Account management is the responsibility of the NHSmail Local Administrators on a daily basis.

When a user leaves the owning organisation, their NHSmail account should be marked as a ‘leaver’ by their Local Administrator. The account remains in the leaver state for 30 days on the system after which the account and the data within it is deleted and not recoverable.

During this period of 30 days, the user’s account can be ‘joined’ to a new owning organisation if they are moving employment to another organisation that uses NHSmail. This allows the user to retain their NHSmail address from one role to another.

What to do with an NHSmail account when a user leaves their owning organisation

If a user is leaving their owning organisation there are two options:

1. Mark the account as a leaver and it will follow the account lifecycle process and be permanently deleted.
2. Transfer the mailbox to another owning organisation.

Marking the account as a leaver to be permanently deleted

If the user is leaving the owning organisation and moving to an organisation that does not use NHSmail, their NHSmail account must be marked as a leaver and permanently deleted from the service.

Actions for users	Actions for Local Administrators
<ol style="list-style-type: none"> 1. Locally archive any role related data / emails. Ensure that job-related information that is not stored elsewhere is passed on 2. Remove any personal emails you wish to keep 3. Put Out of Office message on with onward contact details or your 	<ol style="list-style-type: none"> 1. Work with the user to ensure any role/organisation related data / emails are locally archived. The NHSmail service will not retain any of the account data once the account has been permanently deleted. 2. Mark the account as a ‘leaver’. After 30 days the account will be permanently deleted and

<p>replacement contact details if required</p>	<p>unrecoverable.</p> <ol style="list-style-type: none"> 3. Ensure the email address is removed from organisation wide distribution lists 4. Ensure that the user’s email address is removed from any required local distribution lists 5. Ensure that the user’s access to any shared mailboxes is removed
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Transfer the mailbox to another owning organisation

If a user is leaving one organisation and joining another one that uses NHSmal, they should transfer their NHSmal account between the organisations; **a new account should not be created. The Local Administrator should always establish whether the user has an existing account before creating a new one.**

Whilst transferring between the organisations, the account remains accessible to the user throughout ensuring continuity of service.

Actions for users	Actions for Local Administrators
<ol style="list-style-type: none"> 1. Locally archive any role related data / emails 2. Put an Out of Office message on with your replacement contact details if required and also where you are moving to 3. Make contact with the Local Administrator in your new owning organisation and ask them to mark your account as a ‘joiner’ at the appropriate time. Your organisation display name will change from the old owning organisation to the new one. Guidance is available showing how to find your Local Administrator. 	<ol style="list-style-type: none"> 1. If the user has a larger mailbox, ensure that it is within the 4GB limit by the time the user has joined to the new organisation. If the mailbox is over quota when it has been moved to the new organisation, the user will not be able to send any emails until the mailbox size has been reduced 2. Work with the user to ensure any role/organisation related data or emails are locally archived. 3. Mark the account as a ‘leaver’. After 30 days the account will be permanently deleted and unrecoverable. 4. Ensure the email address is removed from organisation wide distribution lists 5. Ensure that the user’s email address is removed from any required local distribution lists 6. Ensure that the user’s access to any

	shared mailboxes is removed
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What should a Local Administrator do if access is needed to data in an NHSmail account where the user is unavailable or unable to give permission for access

As outlined in the [NHSmail Acceptable Use Policy \(AUP\)](#), NHSmail is a communication tool to support the secure exchange of information and is not designed as a document management system. Documents, emails or messages that are required for retention/compliance purposes should be stored within your organisation's document management system in accordance with local Information Governance policies.

If access to data is required in the absence of the user, you should see the [Accessing Mailbox Data](#) guidance published on the [NHSmail support pages](#).

Links to further guidance

There are a number of relevant training and guidance materials available:

- [NHSmail Acceptable Use Policy](#) – the agreement that all users abide by when joining the service and explains the importance of the information shared over NHSmail.
- [NHSmail Data Retention Policy](#) – details how data can be recovered, including forensic investigations.
- [NHSmail Information Management Policy](#) – explains the information management approach for NHSmail and defines the minimum retention periods for which data will be kept. It also includes an overview of the lifecycle of user accounts.
- [NHSmail Local Administrator Portal guidance](#) – specific guidance for Local Administrators detailing how to manage leavers and joiners on NHSmail.
- [NHSmail: Access to Data Policy](#) – the policy and process for giving access to NHSmail email data in the course of an official investigation.
- [NHSmail Accessing Mailbox data](#) – What a Local Administrator should do if access to data in an NHSmail account is required where the user is unavailable or unable to give permission for access.