

NHSmail – Managing accounts in a closed organisation (England)

Local Administrator guidance

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Glossary

ODS Organisation Data Services

LA Local Administrator

PLA Primary Local Administrator

Purpose

This guide outlines the actions local administrators in England should take in relation to NHSmail accounts when an organisation's Organisation Data Services (ODS) code is no longer valid (it has legally closed).

For organisations in Scotland please contact nhsmail.scotland@nhs.net

Background

Organisations regularly merge, close or open across the health and social care sector meaning changes to ODS codes occur. To ensure contact details are correctly reflected in the NHS Directory, NHSmail accounts must be owned by a legally open organisation with a valid ODS code. NHSmail accounts belonging to a closed organisation (an ODS code that has been legally closed) must be moved into a replacement, legal/open, organisation; either newly created or an existing organisation.

Local Administrator (LA) preparation

1. Run a report in the portal to identify all of your NHSmail accounts – reporting [guidance](#) is available
2. Liaise with your HR department to find out whether all user accounts will need to:
 - transfer out of the closed organisation and into the replacement organisation
 - be marked as a 'leaver' and allowed to be deleted from the service.

Ensure that all currently disabled accounts i.e. those disabled for maternity leave, long-term sickness etc. are correctly identified.

3. Find out whether existing shared mailboxes (SMs) will need to transfer into the replacement organisation.
 - Ensure any data contained within shared mailboxes is transferred out and stored locally. This protects data that is only relevant to the closed organisation.
 - Review all access to shared mailboxes and shared folders to protect sensitive or patient information.
4. Find out whether existing distribution lists (DLs) will need to transfer into the replacement organisation.
 - Static and Dynamic DLs can be transferred into the replacement organisation.

- Members of static distribution lists can be exported to a csv file and a new list created. The original DL in the closed organisation can be deleted. Distribution list membership should be reviewed at this time.
5. Check for any existing duplicate NHSmail accounts (download the duplicate report in the [Portal Admin guide](#)) and:
 - decide on the account that should be transferred (ensure duplicate accounts are not created for users when transferring between organisations)
 - mark as a ‘leaver’ all accounts that are **not** required to be transferred.
 6. Check for any additional services i.e. larger mailbox quotas and confirm whether the additional services are required to transfer to the replacement organisation. The additional services will be lost once the account is joined to a replacement organisation. The replacement organisation needs to ensure that an agreement has been signed with Accenture to keep the properties of the mailboxes when it takes ownership of the account. Details can be obtained from nhsmail.development@accenture.com
 7. Work with your users to ensure any role/organisation related data or emails are locally archived in the closed organisation by using locally procured archiving solutions or using Outlook profiles to export content via pst files.

Tasks for the Primary LA (PLA) in ‘Closed’ organisations

1. Ensure the organisation(s) which your users are transferring into is listed in the [NHS Directory](#) (you will need to be logged into your NHSmail account). If the organisations haven’t had a ‘shortname’ allocated they won’t be listed and you’ll need to email the organisation data services (ODS) code to feedback@nhs.net providing the details of the organisation your users need to transfer into.
 - If you do not know what the organisation code is go to <https://digital.nhs.uk/organisation-data-service/data-downloads> If the new organisation doesn’t appear in the list please email exeter.helpdesk@nhs.net for guidance. Organisations will be published in the NHS Directory as they become available from the Organisation Data Services team.
2. Ensure the replacement organisation has a nominated PLA. If you wish to become the PLA for the replacement organisation, please email feedback@nhs.net with the following information:
 - Your name, role and current organisation name
 - The ‘replacement’ organisation name and ODS code
 - If you are not the PLA for your existing organisation, please provide confirmation from the Head of HR or Head of IT in the ‘replacement’ organisation that they support your request (please copy them on your request to feedback@nhs.net)
3. If you wish to become a Secondary LA please contact the PLA in the replacement organisation. All PLAs can set up additional Secondary LAs as long as they have LA rights for the organisation the requestor belongs to.

4. Any NHSmail accounts that are identified as needing to transfer into the replacement organisation should be marked as a 'Leaver' and must be joined to the new organisation within 30 days.
5. Mark all accounts that are **not** required to be transferred as 'leaver' and after 30 days they will be automatically deleted. Make sure this includes any that are disabled.
6. Any shared mailboxes or distribution lists no longer required should be deleted in the admin tools. Be mindful that once deleted they cannot be restored.
7. Transfer any distribution lists or shared mailboxes that will be required in the replacement organisation.
 - Dynamic DLs will keep the old rules but will not work automatically. The owner/LA will need to ensure the rules are updated otherwise sending to the dynamic DL will fail.
8. Archive any mailbox content not being transitioned to the replacement organisation as per local policy.
9. LAs are prevented from creating any new NHSmail accounts in the 'closed' organisation
10. The accounts marked as leaver will need to be marked as 'joiner' by the new organisation within 30 days by the relevant LA or they will be deleted.
11. If a disabled account is marked as a leaver, the owner may not be able to contact the LA in their new organisation to ensure it is joined within 30 days e.g. the owner is on maternity leave. If this is the case, contact the LA in the new organisation on behalf of the user and ask them to join the account.
12. Once the above work is complete, if your personal NHSmail account is still owned by the 'closed' organisation, mark it as a leaver and ensure it is marked as a joiner in your new employing organisation (**don't do this until all other work is complete**).
13. Rescind your LA rights for the 'closed' organisation (this will not affect your LA permissions in other valid NHS organisations).

Tasks for the PLA in the transfer organisations

Setting up LA rights in a new organisation

A Primary Local Administrator (PLA) must be created in every new organisation (email feedback@nhs.net if this hasn't already been done). Once this is done we recommend the PLA creates a test user account in the 'closed' organisation. The PLA should immediately mark the test account as a 'Leaver' and transfer it into the new organisation. This will check the LA permissions are set up and working correctly in the new organisation.

PLAs in new organisations must:

1. Ensure they have strong links in place with the closed organisation PLA (if it isn't the same person)
2. Mark accounts as 'joiner' where they have been flagged as 'leaver' from the closed organisation

Permissions

Access rights for Shared mailboxes, DLs, DDLs and LA permissions

LA rights and Shared mailbox/DL and Dynamic Distribution List (DDL) memberships are affected when being moved from one organisation to another.

Does the membership/permission stay with the user after transition to a new organisation?				
	LA rights Primary/LA/Helpdesk	Shared mailbox membership	Static DL membership	DDL membership
Portal managed	No	Yes	Yes	No

Accounts managed by the portal admin tools

- After an account is marked as a ‘leaver’ if it is not joined to a new organisation within **30 calendar days**, it will be deleted and removed from the NHS Directory.
- Any LA permissions the user had will be **removed** when their account is marked as a leaver; this applies to Primary/Local Admin / Helpdesk Admin rights.
- A leaver **will continue** to be able to access a shared mailbox in the ‘closed’ organisation they have left unless the permissions are changed by the shared mailbox owner or until it is deleted.
- Users will continue to be able to access static distribution lists in the ‘closed’ organisation it’s therefore important that LAs liaise with users to agree a suitable timescale for deletion.

Need extra help?

Please call the NHSmal helpdesk on 0333 200 1133 or email helpdesk@nhs.net

If you require any further information that is not provided within the guidance documentation please contact the NHSmal team at feedback@nhs.net

Links to further guidance

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

- [NHSmal Local Administrator Portal guidance](#) – specific guidance for Local Administrators detailing how to manage leavers and joiners on NHSmal.