
Social Care: local sponsorship model guidance for sponsors/ Local Administrators

**Guidance for sponsors/ Local
Administrators on assessing care home
requests and registering NHSmail accounts**

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Contents

1. Introduction	3
2. Assessing NHSmail account requests from care homes	3
2.1 Validating the care home's identity	3
2.2 Validating the care home's eligibility for an account	3
2.3 Assessing the number of accounts requested	4
3. Approved applications	4
4. Rejected applications	4
5. Registering care home accounts	4
6. Licensing requirements	7
7. Ongoing management of care home accounts	7
8. Further Help	7
Appendix 1: NHSmail account application form for CQC registered care homes	8
Appendix 2: Local Sponsorship Model Process Flow	9

1. Introduction

Care homes requesting NHSmail accounts via the local sponsorship model must have their request approved before they are assigned NHSmail accounts by NHSmail Local Administrators in the sponsoring organisation. This document provides guidance to these Local Administrators on assessing care home requests for accounts and steps to take once they are approved or rejected.

Please note: the local sponsorship model is suitable for care homes that do not have the capability to carry out NHSmail local administration activities themselves. Sponsoring organisations should ensure that requests and approvals from care homes that are part of a care home group are made with knowledge of the care home group's head office.

2. Assessing NHSmail account requests from care homes

Check the care home has completed the application form in Appendix 1 to provide the following information:

- Name
- Role
- Contact email address
- Care home name, address and telephone number
- CQC registration number
- Evidence the care home has completed their IG toolkit and included their assessment report with their application
- Details of any existing NHSmail accounts held by the individual or care home
- Confirmation the care home has a regular requirement to exchange data securely
- Number of individual and shared mailboxes required

The information above must be received in full before progressing the request.

When you receive a request, please confirm receipt to the requestor advising them of your locally agreed timescales for assessing the account application and getting back to them with a decision.

2.1 Validating the care home's identity

You can check the care home's identity and registration status by searching by their CQC registration number on <http://www.cqc.org.uk>. The number in their application should match the CQC site details.

2.2 Validating the care home's eligibility for an account

Check the care home has completed their IG toolkit by searching on the IGT website <https://www.igt.hscic.gov.uk>. Go to 'Reports', 'Assessment Report' and search by organisation name. For further information on care homes completing the IG Toolkit please

see this guide. You can also email scp.general@nhs.net for the latest care home guidance, or if you need some further advice or assistance.

2.3 Assessing the number of accounts requested

In line with the [NHSmial Access Policy](#), care homes should be allocated the number of accounts required to conduct their business but this isn't expected to be more than three accounts per care home, plus one shared mailbox. If the application is approved but the care home has requested more than four accounts, they should be informed only four will be created unless they have business justification. For exceptional circumstances please contact feedback@nhs.net

3. Approved applications

If the application meets the criteria and you approve it, email the requestor to tell them their request for accounts is approved and they will be contacted with further details once the accounts have been created.

4. Rejected applications

If the application does not meet the access criteria for NHSmial and you reject it, follow the steps below:

- Email the requestor to tell them that their request for accounts is rejected, including reasons for the decision. Include a link to the [sending secure email page](#) to offer the alternative solutions for secure email.
- If they wish to discuss this decision further please advise them to contact the NHSmial team at feedback@nhs.net

5. Registering care home accounts

5.1 To register a care home account, follow the steps below:

Only Local Administrators in the hosting organisation can register NHSmial accounts for care homes that will be owned by the hosting organisation.

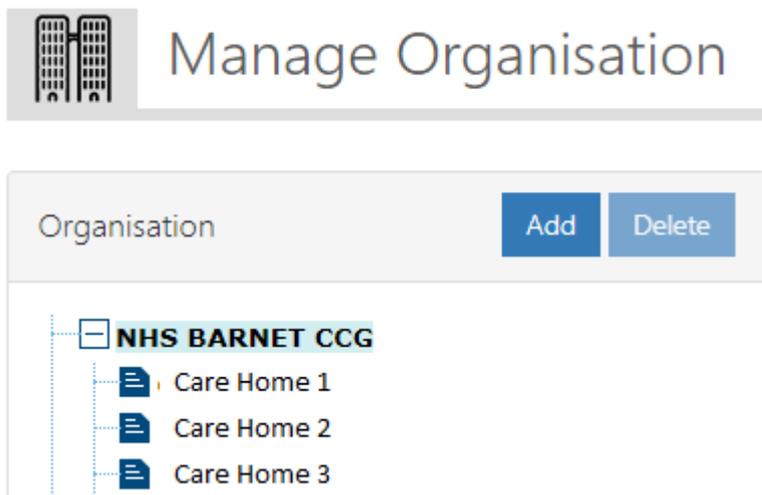
If your organisation is connector managed, you should continue to follow local policy for registering and managing accounts.

Before registering individual accounts, it is recommended that you create an organisational unit in NHSmial within your CCG itself. By doing this it will allow you to create all care home users in the sub-organisational units and therefore identify easily which of your user accounts belong to care homes. It may be the case that you manage multiple care homes and segregating your users into separate organisational units will help with user management/maintenance.

5.1.1 To add a new organisational unit within your CCG you need to:

- Log on to your account at www.nhs.net
- Navigate to the “Admin” tab and select “Organisation”
- Under “Manage Organisation” click the Add button and type the name of the care home you wish the new organisational unit to have

An example below illustrates how your organisation may look in the NHS Directory having created organisational units for the care homes that you manage.



When you create a user as described in the next section of this document below you will be able to assign the user to the organisational unit you have created for the care home you manage.

5.1.2 To create a new user:

1. Click **Admin** in the navigation bar at the top of the screen and select **User Management** from the drop down menu.
2. Click **Add** in the top left of the screen and select **User** from the drop down menu.
3. Enter the **Title, First Name, Last name** in the appropriate boxes. All fields with an * are mandatory. The display name will be filled in automatically based on the user’s first and last name.
4. Type in any contact numbers, including **Mobile, Telephone, Pager, Fax** and **Job Title** into the designated textbox.
5. Select an **Email Alias** from the drop down menu. The naming convention required for users is: `firstname.lastname@nhs.net` .
6. Click **Generate Password** to generate a password for users. You should follow local guidance on the methods of distribution of passwords to new users. Users will be asked to change their password when they log in for the first time.
7. Select the user’s Organisation from the drop down menu. You will only be able to select an organisation that you have administration rights over.
8. If appropriate, select the user’s **Organisational Unit** clicking the + and – in the expandable list. In this instance you will be selecting the care home organisational unit that you have previously created.

9. If required select a site. For a user working in a care home, this is unlikely and therefore no site needs to be selected
10. Click **Create** at the bottom of the page once you have entered all required information for the user's email account
 - Once a user's account is successfully created you should guide the user to log in at www.nhs.net and use their temporary password provided. On first log in, the user will need to reset their password, accept the Acceptable Use Policy, update their profile and set their security questions. Users will not be able to use NHSmail until they have completed these steps. Please refer the user to the [NHSmail Portal User Guide](#) for more information on completing these steps.
 - Users will also receive a welcome email as the first email into their inbox. You should encourage users to read this carefully
 - Local Administrators will only be able to create and edit user accounts for organisations over which they have administration rights
 - To edit a user's account details, refer to the Edit a User for more information
 - When you contact the user, ensure that you give them the local IT helpdesk number they can contact for ongoing support

Once you have created a new account, the user will need to log into their email and sign up to the Acceptable Use Policy for the service. They will not be able to send emails, or use any portal features until they have completed this step.

The details you add when setting up the new account will appear on the NHS Directory and will be searchable by any other user.

5.1.3 To create a shared mailbox

A shared mailbox is a type of mailbox that can be accessed by a group of users from the same organisation. The shared mailbox may be used for several reasons (e.g. a district nursing team may have a shared mailbox for incoming referrals that the entire team has access to so anyone on duty can read or action the email). To access the shared mailbox users must first be granted 'Send As' or 'Full Access' permissions by their local administrator.

1. Click **Admin** in the navigation bar at the top of the screen and select User Management from the drop-down menu
2. Click **Add** at the top left of the screen and select Shared Mailbox from the drop-down menu
3. Type the shared mailbox **Display Name** into the text box. Display names must be less than 30 characters and contain no special characters, numbers or spaces.
4. Select the **Organisation** from the drop-down list
5. If appropriate, select the **Organisational Unit** by clicking the + next to the organisation name to expand the list.
6. Type the shared mailbox **Email Name** into the text box. An email address will be automatically generated after the Email Name is entered. It will begin with the organisation short name which will always be the CCG short name. The naming convention for shared mailboxes in care homes should, where possible, follow this format: [CCGshortname.carehomenamelocation@nhs.net](#). For example:

xyzccg.carehomenameleeds@nhs.net. Note that the CCGshortname part of the email address cannot be changed. Where there are two care homes with the same name in the same town/city, we recommended that they differentiate by location i.e. for two care homes based in London, londoneast and londonwest could be used.

7. Click **Hide from address lists** if you would not like the shared mailbox to display in the NHS Directory. If you do not click this box, users of NHSmail will be able to search for the shared mailbox on the NHS Directory, but will not be able to see who the members of the shared mailbox are. Only users of Outlook Desktop Application will be able to view the members of a shared mailbox.
8. Enter a description of the mailbox which will be shown in the directory.
9. Setting the shared mailbox permissions by adding users. More information on how to do this can be found [here](#).

6. Licensing requirements

Organisations using the NHSmail Service are not required to purchase any client access licenses for Exchange for their use of NHSmail. Where organisations have installations of Exchange deployed locally (e.g. for running a local email service) appropriate local licensing will need to be in place. More information can be found in the [NHSmail licensing guide](#).

Mobile or tablet devices connecting to the NHSmail service must have appropriate licenses provided by the device owner. Guidance on connecting mobile devices to the NHSmail service is available in the [NHSmail mobile configuration guide](#).

7. Ongoing management of care home accounts

We recommend the Primary LA sets up a care home practice LA (helpdesk or Local Administrator) so that they can perform administrative tasks such as unlocking accounts and resetting passwords.

The primary local administrator in the hosting organisation remains responsible for the ongoing administration and governance of care home accounts. A process should be put in place for care homes to inform you if they no longer need their account so that it can be deleted.

8. Further Help

For help with the NHSmail portal functionality, contact the national helpdesk on 0333 200 1133 or see the [Portal Local Administrator Guide](#).

For advice on changing and uploading NHS Directory data please contact the ODS team at Exeter.helpdesk@nhs.net

For policy advice, feedback or anything else contact the NHSmail team at feedback@nhs.net

Appendix 1: NHSmail account application form for CQC registered care homes

Care homes should complete this form and email it to the nominated contact in their sponsoring organisation. If this has not been identified, please contact feedback@nhs.net

Name:		Role:	
Email address:			
Organisation name and address:			
Organisation telephone number:			
CQC registration number:			
Confirm that you have completed the IG Toolkit. For further information see: https://www.igt.hscic.gov.uk/	Yes/No		
Does your care home already hold any NHSmail accounts? Y/N		If yes, please provide the email address(es):	
Confirm that your care home has a regular requirement to exchange data securely and why	Yes/No		
Number of individual person accounts required, preferred account name and mobile number for each account owner:	Note: a maximum of 3 user accounts will be provided. Please provide a business justification if you require more than this.		
Do you require a shared mailbox for your care home? If yes, please state the preferred mailbox name (it may not be possible to use the exact name requested). Please also confirm the account owner name and mobile number:	Note: The sponsoring organisation's short name will automatically preface the shared mailbox email address.		
What benefits do you expect from using NHSmail?			

Appendix 2: Local Sponsorship Model Process Flow

