Update Log

Key Updated Sections

- Users will receive their 4GB mailbox quota once their mailbox transitions to NHSmail 2
- Refer to the Service Status pages for more information on the status of the NHSmail 2 services and any key known issues impacting users.
Introduction

Welcome to the NHSmail 2 User Transition Guide. This guide will provide you with everything you need to know about the movement of your email account to the new NHSmail service.

We will continue to keep this guide updated with any new information as we move through the transition period. Revised information will be highlighted at the beginning of the guide. The transition period will run from the point at which we start moving accounts until all accounts are transitioned and the NHSmail 2 Portal has gone live. The transition period will start from 6 May 2016.

The guide is broken up into the following sections:
• **Transition summary**: providing a summary of the key information you need to know, about the movement of your email account to NHSmail 2.
• **Detailed transition information**: providing a detailed view of the transition process and all of the changes you will experience.
• **Further information and support**: providing further information on troubleshooting, the NHSmail training and guidance materials and general best practice.

Information will be provided for users accessing their email using:
• Outlook Web App (OWA) at [www.nhs.net](http://www.nhs.net)
• A desktop applications such as Outlook
• A mobile device

You can start learning about how to get the most out of NHSmail 2 by accessing our training and guidance materials at [support.nhs.net](http://support.nhs.net). If you have issues accessing this website, please see the Troubleshooting Section for guidance.
Using this Guide

The Transition Guide will be updated regularly to ensure you have the most accurate and up-to-date information on the transition of your account from NHSmail to NHSmail 2. It will be published on the NHSmail 2 Support Site and be available from the following URL:

support.nhs.net/communications

The Transition Guide can be navigated using:

- The home icon in the footer of each slide can be used to navigate back to the contents page
- The page icon in the footer navigates back to the start of each section
- The globe icon indicates that further information is available from a source outside of this document

If you are using Adobe Acrobat or another PDF viewer, you can also use the bookmarks to navigate to each section of this document.
Transition summary
In this section

What is NHSmail 2?  
Useful Terms  
Transition on a page
  Outlook Web App (OWA) at www.nhs.net
  Email / Desktop Clients (e.g. Outlook)
Getting help during transition
What do I need to do?
NHSmail 2 is the national secure collaboration platform for health and social care. The NHSmail 2 Service will replace the current NHSmail Service that you use for your email. Over the coming months, we’ll be working to move your account across to the new service.

Once your account has been moved and the transition has completed, you will be able to benefit from:

- Mailbox with a 4GB quota and improved experience at nhs.net
- Communicate instantly with other users through instant messaging (chat feature)
- Mobile-friendly user tools such as password resets
- Find your contacts more easily with an improved directory

You can find out more on exactly what the Service will offer by reading the NHSmail Summary.
## Useful terms

Throughout this guide, a number of new terms are used that you may not be familiar with. The table below provides definitions for some of the key terms:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browser</td>
<td>An application/program used to access and display web pages. Common browsers include Internet Explorer, Safari and Firefox. Also referred to as a ‘web browser’.</td>
</tr>
<tr>
<td>Outlook Web App (OWA)</td>
<td>Outlook Web App is the website allowing you to access your mailbox, Calendar, Contacts and Tasks through a browser. Referred to as OWA.</td>
</tr>
<tr>
<td>Portal (NHSmail)</td>
<td>The current Portal is how you access your emails via <a href="http://www.nhs.net">www.nhs.net</a>. This includes the user tools (e.g. password change), administrator tools, the NHS Directory and the training and guidance pages for NHSmail.</td>
</tr>
<tr>
<td>Portal (NHSmail 2)</td>
<td>The NHSmail 2 Portal is the website used to access the user tools (e.g. password change), administrator tools, the NHS Directory and the training and guidance pages for NHSmail. This will Go Live at the end of transition.</td>
</tr>
<tr>
<td>Transition Period</td>
<td>The timeframe from the point at which accounts start to be moved to the new service until the NHSmail 2 Portal Go Live. The main period of change for users.</td>
</tr>
<tr>
<td>Transition</td>
<td>The process by which accounts are moved from the current service to the new service.</td>
</tr>
<tr>
<td>Quota</td>
<td>The space allocated in your mailbox.</td>
</tr>
</tbody>
</table>

A full glossary is available from the NHSmail User Guide. You can access the User Guide from support.nhs.net/owaindex
Transition on a page:
Access via Outlook Web App (OWA) at www.nhs.net

<table>
<thead>
<tr>
<th>Stage</th>
<th>Key Experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>• Receive email notification of transition start</td>
</tr>
<tr>
<td>2</td>
<td>• Receive email notification that account is scheduled for transition to NHSmail 2</td>
</tr>
</tbody>
</table>
| 3     | • Receive email notification of successful account transition to NHSmail 2 & upgrade to 4GB quota  
       | • Change the way you navigate to your mailbox at nhs.net  
       | • Change the way you access Shared (Generic) Mailbox and Shared Folder |

<table>
<thead>
<tr>
<th>Stage</th>
<th>Key Experiences</th>
</tr>
</thead>
</table>
| 3     | • Change the way you access mailbox quota information  
       | • Instant Messaging/chat feature available (account will be enabled at some point during transition period)  
       | • Notes functionality unavailable (view-only) |
| 4/5   | • Further information will be added closer to NHSmail 2 Portal Go Live |
Transition on a page:
Access using an email/desktop client (e.g. Outlook)

Stage Key Experiences

1 • Receive email notification of transition start

2 • Receive email notification that account is scheduled for transition to NHSmail 2

3 • Receive email notification of successful account transition to NHSmail 2 & update to 4GB quota
• Change to experience when accessing Outlook Web App (OWA) at www.nhs.net (for example, changing password)

4/5 • Further information will be added closer to NHSmail 2 Portal Go Live

Stage | Key Experiences
---|---
1 | • Receive email notification of transition start
2 | • Receive email notification that account is scheduled for transition to NHSmail 2
3 | • Receive email notification of successful account transition to NHSmail 2 & update to 4GB quota
• Change to experience when accessing Outlook Web App (OWA) at www.nhs.net (for example, changing password)
4/5 | • Further information will be added closer to NHSmail 2 Portal Go Live
Getting help during transition

The three steps below outline how to get help:

1. Check the NHSmail 2 Support Site at support.nhs.net for step-by-step guidance on how to use NHSmail 2

2. Contact your Local Organisation Administrator (LOA) or IT support. Your LOA can help if you are having problems accessing the service or are unable to find the information you need

3. Contact the NHSmail Helpdesk on 0333 200 1133 or email helpdesk@nhs.net if you are unable to resolve your query from the Support Site or your LOA

You will never be asked to …

• Provide your password; either verbally to deal with a helpdesk query or via email
• Provide us with the complete answer to your security questions, only the relevant letters
• Log into your account from any website other than www.nhs.net

Finding your LOA

To identify your LOA, search for yourself in the NHS Directory accessed via www.nhs.net. Click on your name and click on the Administrators Tab to see a list of the LOAs for your organisation.

You can find a quick reference guide on locating your LOA at:

support.nhs.net/communications
What do I need to do?

In preparation for transitioning to NHSmail 2, you should:

- Ensure you have access (outside of your email account) to any information that you require for your day to day role;
- Make a note of your LOA or local IT support contact details;
- Familiarise yourself with the NHSmail 2 training and guidance materials published at support.nhs.net.

Following transition to NHSmail, you will need to:

Re-add your Shared Folders to your mailbox in Outlook Web App (OWA). This is a simple task and on-screen instructions will be provided on how to do this. You will not need to reset any permissions, you will only need to add the folder to your mailbox in OWA.

If you access NHSmail using an email client, such as Outlook, you do not need to re-add your shared folders. They will continue to operate as normal.

Continue reading this document for more detailed information on transition to NHSmail 2.
Detailed transition information
In this section

What communications will I receive? 16

What will happen when my accounts moves? 17

Outlook Web App (OWA) access at www.nhs.net
Desktop access (e.g. Outlook)
Mobile device access

What will change after my account moves? 19

Outlook Web App (OWA) access at www.nhs.net
Desktop access (e.g. Outlook)
What communications will I receive?

The approach being taken to move accounts from NHSmail to NHSmail 2 has been designed to have minimal impact on our users. This section outlines what communications you can expect to receive during the transition period.

How will I know when my account is going to move?
The transition period will run from the early May until the beginning of August. You will find some of your colleagues’ accounts will move before and after yours. You will receive an email informing you that your account will be moving prior to the transition taking place. You will not be provided with a precise time for the movement of your account.

What communications will I receive?
You will receive email communications at each of the points outlined below:

• **Prior to start of the transition period:** you should have received an email from us outlining the end-to-end process and you should keep a copy handy.

• **Prior to email account transition:** you will receive an email from us once your account has been scheduled for transition. This will confirm the start of the timeframe during which your account has been provisionally scheduled to move.

• **Following email account transition:** you will receive a ‘Welcome email’ in your inbox. This will let you know of any actions you need to take once you’re on the new service.

Who will I receive the communications from?
All communications sent to you during the transition process will be from the following:

• No-reply@nhs.net *
• nhsmail.scotland@nhs.net
• NHSmailBroadcast *

* Please note, these mailboxes are not monitored. Should you need support, you should follow the existing support routes outlined in the Further Information and Support Section.

During the transition to NHSmail 2, there may be an increase of spam and malicious emails attempting to compromise NHSmail accounts. Please report any emails asking for this to the NHSmail Helpdesk at spamreports@nhs.net.
What will happen when my accounts moves?

The illustrations below outline what will happen to your account depending on the way you access NHSmail.

I use Outlook Web App (OWA) at www.nhs.net to access my email

If you are logged in when your account is moved, you will receive an on-screen message asking you to log out and log back in again. When you log back in, your account will have been moved to NHSmail 2. After logging in, you will notice you are presented with a new screen. The screen will tell you your account has been transitioned and you will be able to access your mailbox. You will find a welcome email in your mailbox notifying you of the successful transition. The email will provide you with a number of tips for getting started with NHSmail 2.

If you are not logged in when you account is moved, you will simply find the new screen appears when you next log in. The welcome email will also be in your inbox.

I use an email/desktop client such as Outlook to access my email

If you are working with your email when your account is moved, you will receive an on-screen message asking you to close and re-open the application. Once re-opened, you will find a welcome email in your inbox notifying you of the successful transition. The email will provide you with a number of tips for getting started with NHSmail 2.

If you are not working with your email when your account is moved, you will simply find the success email in your inbox when you next open your email application.
What will happen when my accounts moves?

I use a mobile device or tablet to access my email

If you access email on your mobile device or tablet, you may receive an on-screen message informing you that some settings have been changed. You should accept this message and will not need to take any action. You will be able to continuing using email on your device as normal.

Things that won’t change

We’ve received a number of questions from users about what will change after their account moves to the new service. The next section outlines the changes in detail, however there are a number of things that will stay exactly as they are now. The key aspects that will remain unchanged are:

- **Your username and password** –
  Your username and password will remain the same as it was before your account moved;

- **The URL for accessing NHSmail via Outlook Web App (OWA)** –
  The Service will still be accessed at [www.nhs.net](http://www.nhs.net);

- **The contact details for the NHSmail and Relay Helpdesks** –
  You can still contact the Helpdesk on the existing telephone number and email address provided in the Further Information & Support Section;

- **The guidance on managing your mailbox quota** –
  You still need to manage your mailbox within your quota and use email only for temporary data storage. It should not be used as a replacement to your existing systems for storing data.
What will change after my account moves?
Access via Outlook Web App (OWA) at www.nhs.net

The table below provides information on the changes after your account has moved to NHSmail 2 if you access NHSmail on the web at www.nhs.net. A detailed What’s Changing Guide will be published shortly to provide more information on the changes.

<table>
<thead>
<tr>
<th>Change</th>
<th>What do I need to know?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web page following sign in to NHSmail 2</td>
<td>Following signing in to NHSmail 2, you will be presented with a new web page (shown below). You will continue to use the icons at the top of the screen to access the user tools, NHS Directory and your shared folders. To access your mailbox, you will need to select the orange box titled “Click here to access your mailbox”. This will open your mailbox in a new tab within your browser. Your username and password will remain the same following transition of your account.</td>
</tr>
</tbody>
</table>
## What will change after my account moves?

**Access via Outlook Web App (OWA) at www.nhs.net**

<table>
<thead>
<tr>
<th>Change</th>
<th>What do I need to know?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Re-add and accessing Shared Folders from Outlook Web App</td>
<td>Before transition, you can view the Shared Folders that you have access to by clicking the “Folders” icon. Following transition, you will need to re-add your Shared Folders to your mailbox within Outlook Web App (OWA). Your permissions will be retained and you can review the mailboxes you have access to from the existing Folders Screen (folders icons). Instructions will also be provided on re-adding these folders to your mailbox from this screen. Further guidance is available in the Delegated and Shared Mailbox module on the Training and Guidance Pages: <a href="#">Advanced Mailbox Management</a>.</td>
</tr>
<tr>
<td>Accessing Shared (Generic) Mailboxes from Outlook Web App</td>
<td>Before transition, you can view the Shared (Generic) Mailboxes that you have access to by clicking the “Folders” icon. Following transition, you will access your Shared Mailboxes via Outlook Web App (OWA). Your permissions will be retained and you can review the mailboxes you have access to from the existing Folders Screen (folders icons). Further guidance is available in the Delegated and Shared Mailbox module on the Training and Guidance Pages: <a href="#">Delegated and Shared Mailbox module</a>.</td>
</tr>
</tbody>
</table>
What will change after my account moves?
Access via Outlook Web App (OWA) at www.nhs.net

<table>
<thead>
<tr>
<th>Change</th>
<th>What do I need to know?</th>
</tr>
</thead>
<tbody>
<tr>
<td>View your mailbox quota from Outlook Web App (OWA)</td>
<td>Before transition, your mailbox quota can be viewed by clicking the “User Tools” (Spanner/Screwdriver) icon. Following transition, you will need to review your mailbox quota within Outlook Web App. Training is provided in the Mailbox Management module on the Training and Guidance Pages. <a href="#">Mailbox Management module</a></td>
</tr>
<tr>
<td>View your To Do Bar items from Outlook Web App (OWA)</td>
<td>Before transition, you can view the number of unread emails, tasks and reminders that you have by clicking the “User Tools” icon. Following transition, these will no longer be available from the User Tools Screen. You will be able to view these items within Outlook Web App on NHSmail 2. Training is provided in the Outlook Web App Learning Series on the Training and Guidance Pages. <a href="#">Outlook Web App Learning Series</a></td>
</tr>
<tr>
<td>Add users to your contacts and sending email from the NHS Directory</td>
<td>Before transition, you will be able to add users to your contacts or send emails to them directly from the NHS Directory. Following transition, these features will no longer function from the current NHS Directory. You will be able to complete these actions from the People Screen within OWA. Training is provided in the Managing Contacts module on the Training and Guidance Pages. <a href="#">Managing Contacts module</a></td>
</tr>
</tbody>
</table>
What will change after my account moves?
Access via Outlook Web App (OWA) at www.nhs.net

<table>
<thead>
<tr>
<th>Change</th>
<th>What do I need to know?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start using Instant Messaging (chat feature) and Presence Management</td>
<td>Instant Messaging and Presence Management will become available during the transition period. You will know when your account has been enabled for IM by a coloured presence indicator being shown next to your name in OWA as shown below:</td>
</tr>
<tr>
<td>from Outlook Web App</td>
<td><img src="image" alt="Mary Margot" /></td>
</tr>
<tr>
<td>Notes available in read-only mode from Outlook Web App</td>
<td>Before transition, you can add, edit and read Notes. Following transition, you will be able to access your Notes in read-only mode. You will be able to print your Notes, but will not be able to add new or change existing Notes.</td>
</tr>
<tr>
<td>Outlook Web App Light experience following transition</td>
<td>If you use an un-supported browser, following transition you will be presented with Outlook Web App light when accessing your mailbox. You can find more information on the supported browsers and features available in the OWA Standard vs. OWA Light Guide:</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="OWA Standard vs. OWA Light Guide" /></td>
</tr>
</tbody>
</table>
What will change after my account moves?
Access using an email/desktop client (e.g. Outlook)

The table below provides information on the changes after your account has moved to NHSmail 2 if you access NHSmail via a desktop application (e.g. Outlook).

<table>
<thead>
<tr>
<th>Change</th>
<th>What do I need to know?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web page following sign in to NHSmail 2 (e.g. after logging in to Outlook Web App – OWA) at <a href="http://www.nhs.net">www.nhs.net</a> to change your password)</td>
<td>Following signing in to NHSmail 2, you will be presented with a new web page (shown below). You will continue to use the icons at the top of the screen to access the user tools, NHS Directory and your shared folders. To change your password, you will continue to complete this action via the User Tools Screen. The screenshot on the left shows the screen that you should expect following logging in. Your username and password will remain the same following transition of your account.</td>
</tr>
</tbody>
</table>
Further Information and Support
## In this section: Further information and support

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
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<td>Troubleshooting and specific guidance</td>
<td>26</td>
</tr>
<tr>
<td>Training and guidance materials</td>
<td>28</td>
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<td>Best practices</td>
<td>29</td>
</tr>
<tr>
<td>Additional information</td>
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</tr>
<tr>
<td>NHSmail 2 Clinical safety consideration: Intended email use</td>
<td>31</td>
</tr>
</tbody>
</table>
## Troubleshooting and specific guidance

<table>
<thead>
<tr>
<th>Who?</th>
<th>Topic</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users accessing NHSmail using IMAP/POP3 over the Internet (e.g. Thunderbird client)</td>
<td>IMAP/POP3 over the Internet Retirement</td>
<td>Access to NHSmail using IMAP and POP3 over the Internet will be retired. These protocols are typically used by desktop applications such as Thunderbird and Apple Mail. If you are using an application accessing NHSmail using these protocols, you should make appropriate arrangements for an alternative access method via your Local Organisation Administrator (LOA). Following the transition of your account, <strong>you will no longer be able to access NHSmail if you are using IMAP or POP3 over the Internet. Users accessing over N3 will not be affected.</strong></td>
</tr>
<tr>
<td>Users with specific Internet Explorer Security Zones set</td>
<td>Internet Explorer Security Zones to include *.nhs.net</td>
<td>If you have set up specific websites within your “allowed zones” through Internet Explorer, you should ensure that you include a wildcard entry as opposed to specific websites. If specific websites are included, you may face issues using the service from 29 April. <a href="#">LOA Bulletin 18 April – support.nhs.net/communications</a></td>
</tr>
<tr>
<td>Users facing issues accessing NHSmail</td>
<td>Blocked IP Addresses</td>
<td>If you are having issues accessing NHSmail and are receiving a message similar to “Access Denied”, “Forbidden Website” or “Timeout”, your organisation may require changes to their firewalls. LOAs have been provided with the information required to remediate this. You should contact your LOA for support if you experience any of the error messages described above.</td>
</tr>
</tbody>
</table>
### Troubleshooting and specific guidance

<table>
<thead>
<tr>
<th>Who?</th>
<th>Topic</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users facing issues accessing support.nhs.net</td>
<td>Enabling access to support.nhs.net from local networks</td>
<td>If you are experiencing issues accessing support.nhs.net from local networks you are advised to pass the following information on to your LOA: this issue is likely to be caused by local network configuration bypassing *.nhs.net traffic past their proxy server. <a href="https://support.nhs.net">Support.nhs.net</a> is available over the Internet and should not bypass the proxy.</td>
</tr>
</tbody>
</table>
A brand new training and guidance website has been launched for **NHSmail 2** at [support.nhs.net](https://support.nhs.net). The site will continue to be improved over the coming weeks and includes:

- **User Guide**: Detailed guide on all functions for Outlook Web App, Skype for Business and the NHSmail 2 Portal.
- **Training Videos**: Short videos for each of the training modules reflecting the steps in the Quick Reference Guides.
- **Guidance Materials**: Technical, policy and best practice advice for using NHSmail 2.

A table of key links is provided below to the current materials available:

<table>
<thead>
<tr>
<th>Section (Click to access)</th>
<th>What's included?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outlook Web App Learning Series</strong></td>
<td>Selection of modules on how to use Outlook Web App (OWA) via <a href="https://www.nhs.net">www.nhs.net</a></td>
</tr>
<tr>
<td><strong>Skype for Business Learning Series</strong></td>
<td>Selection of modules on how to use the Instant Messaging and Presence Management features of Skype for Business (desktop)</td>
</tr>
<tr>
<td><strong>Guidance</strong></td>
<td>Guidance on a variety of topics, including; sharing sensitive information, using NHSmail with a desktop application and dealing with spam</td>
</tr>
</tbody>
</table>
Best practices

This section outlines best practices for users transitioning from NHSmail to NHSmail 2.

Actions to prepare for transition
To prepare for transition you should:

- Ensure you have access (outside of your email account) to any information that you require for your day to day role;
- Make a note of your LOA or local IT support contact details;
- Familiarise yourself with the NHSmail 2 training and guidance materials published at http://support.nhs.net.

Clinical Safety
The NHSmail 2 Programme Team have carried out thorough Clinical Safety Assurance prior to transition. There is no downtime or loss of service anticipated during transition. While there will be a national safety case for NHSmail, you should ensure that your use of NHSmail follows your local Clinical Safety and Information Governance guidance.

Business Continuity
You should ensure that you are familiar with your local organisation’s business continuity processes. These are the processes that your service or team should adopt in the event of unavailability of NHSmail/email.

Housekeeping
You should ensure that you follow the housekeeping guidelines below in your use of NHSmail:

- **Delete old emails**: You should ensure all unnecessary emails are deleted or archived.
- **Permissions**: You should ensure that all shared folder, shared mailbox and calendar access is up-to-date.
- **Notes**: The notes feature will not be available in Outlook Web App following transition to NHSmail 2. Notes will be transitioned over to NHSmail 2 but you will not be able to edit these notes or create new notes. If you are a frequent Notes user, you should consider an alternative tool and keep a copy of your current Notes for future use.
The NHSmail Helpdesk telephone numbers and email addresses will remain the same throughout and after transition.

If you are experiencing issues with NHSmail or the Relay Service, the contact details are provided for the helpdesks below:

NHSmail Helpdesk: 0333 200 1133 / helpdesk@nhs.net
Relay Helpdesk: 0333 200 4333 / relayhelpdesk@nhs.net
Spam and phishing issues: spamreports@nhs.net

You can access further guidance and support through the links below:

NHSmail 2 training and guidance: support.nhs.net

Communications and transition guidance including:

- Browser differences guide
- Finding your LOA guide
- Communications archive

These materials can be found at support.nhs.net/communications
The NHSmail 2 solution will be deployed within health and social care organisations. Its intended use is for communication and collaboration only, however in these settings the incorrect use or failure of this system has a potential to expose personal information and/or personal health information which may have a clinical safety implication. It is intended that the NHSmail 2 system will be used to exchange clinical information. The NHSmail 2 system is not intended for storage of clinical information.

**Guidance:** Email is not supposed to be stored for long term retention. Clinical content must be placed in a clinical repository. Bigger quotas are for transient storage only before permanent storage into the corporate/clinical data repository.

Further clinical safety recommendations will be available in the revised policy and guidance documentation for NHSmail 2.