NHSmail Portal
User Guide
# Document Version Control

## Document Information

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Using Bookmarks

This guide has been formatted with Bookmarks so you can intuitively navigate around each of the sections and easily find the content you wish to learn about. Each Bookmark goes to a different page within the guide.

To use Bookmarks in a guide that you have downloaded and opened in a PDF reader:

1. Click the Bookmark icon in the toolbar on the left side of the screen

2. Click on each of the section titles to view the content you wish to open
Using Bookmarks

To use Bookmarks in a guide that you are viewing through a PDF web viewer:

1. Click the Bookmark icon in the toolbar on the top right side of the screen

2. Click on each of the section titles to view the content you wish to open
Logging into the NHSmail Portal

You can access the NHSmail Portal by going to www.nhs.net. Here you will have access to self-service features to manage your account, such as updating your profile, resetting your password and setting your security questions. You can also access the NHS Directory and support pages where you can view training and guidance materials. Note: If you are logging into the service for the first time then you should refer to the Getting Started Guide.

1. Enter www.nhs.net into your browser window

2. Click Login at the top right of the page

3. Enter your email address and password into the appropriate text boxes and click Sign In

You can just type in the first part of your email address (firstname.lastname) as the @nhs.net part of your email address will auto-populate.

If you have forgotten your password, refer to Resetting your password for more information.

If you entered your username and password correctly, you will be taken to the NHSmail portal.
Navigating around the NHSmail Portal

Following logging in at www.nhs.net, you will see the landing page below. The Portal is intuitively designed and easy to navigate around. By clicking on each of the buttons on the tool bar at the top, you will be directed to different sections of the Portal. Click the Home button at any point to return to this landing page.
Updating Profile Details

Your user profile contains contact information that is added from the information provided when your NHSmail account is created. This information is displayed in the NHS Directory. You can edit your personal contact details, e.g. if your mobile number changes or if you want to add a personal description for yourself. Any updates you make to your profile will be updated in the Directory instantly. However, this information may be over-written if your organisation is connector managed (by a centrally-managed data source). If this is the case, please notify your Local Administrator if any of your key contact details (e.g. mobile number) change.

To update your personal details:

1. Click **Profile** in the navigation bar at the top of the screen.

2. Click on the **My Profile** tab.

3. Enter your new **Telephone, Mobile, Fax or Pager** number.

The mobile number that you set here will be the number used for authentication purposes in self-service password resets. You should only use a work mobile that is used for your sole use, and not shared, or a personal mobile device for this purpose. If you wish to hide a personal mobile number from being displayed in the NHS Directory, click the ‘Hide mobile number from address book’ option. Please note that NHSmail support staff and your Local Administrator will still be able to see this number even if you click to hide it. This includes any reports that a Local Administrator may create. If you do not wish your number to be visible to Local Administrators, you should not add it.
Updating Profile Details

4 Enter your Web Page if applicable

This could be your own personal webpage or your organisation’s website

5 Type a brief description of yourself under Profile

This will show as an About Me section when a user searches for your entry in the Directory. The character limit within this section is 1000

You can also update the Clinical Specialty, Roles and Work Area.

To update the details:

6 Click Edit and select the appropriate option from the drop-down list

Note: You can select multiple specialties, roles and work areas from the drop-down list.

7 Click Next at the bottom of the page

You will then click through to the security questions page, where you will have the option to update your questions and answers if necessary. Refer to the Updating your security questions section for more information

8 Click Save at the bottom of the page
UpdatingProfile Details

The screenshot below demonstrates how other users will see your profile information when they search for your details in the Directory.

About Me

Get in Touch

Nadia Tuner

Organisation

Leeds Teaching Hospital

Address:
Royal Hallamshire Hospital
Avon
01100143321

Site:
Roles:
Clinical Specialities:
Work Area:

Telephone: 02071907045
Mobile: 02073928734
Pager:
Fax: 020890630701
Web page:

Additional Information

• Personal Detail Requirements (telephone, mobile, pager fax)
  • Maximum length is 20 characters, including 8 to 13 digits, and characters + - ()

• Profile Requirements
  • Maximum length is 1000 characters

• If your organisation is Connector (centrally managed data source) managed, be mindful that the connector source will also need to be updated to ensure that any new profile information is not over-written by old details stored within the connector

• If you would like to update your profile picture this is changed through Outlook Web App. More information on this can be found in the Outlook Web App User Guide under Adding and deleting a photo on your profile.
Creating security questions and answers

As a user of NHSmail, you are required to set 3 security questions and answers through the Portal. The answers to these questions will then be used to check your identity, for example, if you need to contact your Local Administrator (LA) due to an account lock out or if you wish to use the self-service password reset. You will never be asked for the whole answer to your security question, only individual characters from it. You should never share the questions or answers with anyone as this will compromise the security of your NHSmail account.

To create security questions and answers:

1. Click Profile in the navigation bar at the top of the screen.

2. Select the Security Questions tab at the top of the screen.

3. Type a question of your choice into the Question textbox and type the correct answer into the Answer textbox under Security Question 1.

Handy Hint

Answers to the security questions are not case sensitive.
Creating security questions and answers

Your security questions and answers must satisfy the following criteria:

• Each of the questions/answers must be different
• Each question/answer must be at least 6 characters long
• You cannot use repeating numbers or letters in a question/answer (eg. 111 or aaa)
• A space will count as a character

Examples of security questions could be: your mother’s maiden name, the model of your first car or the name of your first pet. A green tick will show to the right of the question/answer when it fulfils the requirements

4 Repeat the same process for Security Question 2 and Security Question 3

5 Click Save at the bottom of the page

Warning
Never share the full questions or the answers of your security questions with anyone. You will only be asked for specific characters by your Local Administrator or the helpdesk

Additional Information

• If you forget the answers to your security questions you should contact your Local Administrator to find out how you can authenticate yourself
• Once you are re-authenticated, you will need to reset your security questions. Refer to the Updating Security Questions for more information on how to do this
Updating security questions

You will need to use your security questions and answers when resetting your password for both self-service password reset or when contacting your Local Administrator. You can update your security questions at any time through the Portal. You should do this if the answers to the questions change, you think someone may know the answers to your questions or if you are having trouble remembering the answers to your current questions.

To update your security questions and answers:

1. Click **Profile** in the navigation bar at the top of the screen

2. Select the **Security Questions** tab

3. Edit any question or answer you want by clicking in the appropriate text box and typing the new text

4. Click **Save** at the bottom of the page

Refer to the *Creating Security Questions Quick Reference Guide* for more information about choosing appropriate security questions and answers.

**Warning**

Never share the questions or the answers of your security questions with anyone. You will only be asked for specific characters by your Local Administrator or the helpdesk.
Self-service password reset

If you have forgotten your password you will need to use the self-service password reset feature within the Portal over both an Internet and a N3 connection. To use this, you must know the answers to your security questions and you must have a mobile number set within the profile section of your account (note: you must have access to this mobile). If you do not know the answers to your security questions or you do not have a mobile phone number associated with your account, you will need to contact your Local Administrator to reset your password.

Note: You are able to hide your mobile number so that it is not searchable within the NHS Directory – refer to the Updating Your Profile section for more information.

To use the self-service password reset:

1. Navigate to www.nhs.net

2. Click on Forgot your password?

Handy Hint
Performing a self-service password reset will also unlock the account if it is locked

Sign in with your NHS Mail account

jamie.johnson@nhs.net

Password

Sign in

Forgot your password?
Self-service password reset

3. Type your full email address and last 4 digits of your registered mobile number

![Email and mobile number input fields]

4. Click Next

![Next button]

**Warning**
If you do not have a mobile phone associated with your account or the security questions are not set up, you will see the following message:

There was a problem with your account, this may be due to entering an invalid email address or your account not having security questions or mobile number set up. Please contact your Local Administrator.

5. Enter the appropriate characters of the answers to your security questions into the corresponding box and click Next

![Security question input fields]
Self-service password reset

Warning
You will never be asked to enter the full answer to your security questions

Once you have correctly answered the security questions, a text message with a new temporary password will be sent to the mobile number associated with your account.

If you do not have a mobile number associated with your account, or you have forgotten the answers to your security questions you must contact your Local Administrator.

6. Check your mobile to get the details of your temporary password.


8. Type your email address and your temporary password.
Self-service password reset

Once you log in with your temporary password, you will be prompted to reset your password.

Unlocking your account

If you know the answers to your security questions and have a mobile number set within the profile section of your account (note: you must have access to this mobile), you will be able to unlock your account. If you do not know the answers to your security questions or you do not have a mobile phone number associated with your account, you will need to contact your Local Administrator to unlock your account.

If you lock your NHSmail account, follow the steps 1-5 in **Self-service password reset** to answer the security questions as part of the authentication process. Once you have correctly answered the security questions, you will get two options.

Option 1. To unlock the account without resetting your password:

1. **Select Unlock and Keep Current Password**

The following message will be displayed:

Your account has been successfully unlocked, please use your existing password to login to NHSmail. If you do not remember your existing password please follow the forgotten password link on the home page and choose option ‘Unlock with password reset’.
Self-service password reset

Option 2. To unlock the account and reset the password

1. Select Unlock and Reset Password

A text message with a new temporary password will be sent to the mobile number associated with your account.

Additional Information

- Twelve attempts to login with an incorrect password will lock your account
- Three attempts to answer the security questions with incorrect answers during self-service password reset will lock your account
- You will need to contact your Local Administrator to unlock your account if you do not know the answers to your security questions or you do not have a mobile phone number associated with your account,
Changing your password

To keep your account secure you will need to change your password every 90 days. You will be reminded to change your password via email 18, 10, 5, 2 and 1 day(s) before it expires. Remember, you must change your password immediately if you think someone else knows what it is. If your password expires, you will need to contact your Local Administrator. Following a password change, you should ensure to update your new password on all devices e.g. mobile to avoid future lock outs.

To change your password:

1. Click **Profile** in the navigation bar at the top of the screen

A new window will open within your browser

2. Click **Change Password** at the top right of the screen

3. Enter your **email address**, your **old password**. You will need to re-enter your **new password** twice in the fields provided

Refer to the Additional Information box in this section for information on password requirements
Changing your password

4  Click **Submit**

When your password has been updated you will see the following message

![Update Password](NHS.png)

Update Password

Your password is successfully updated.

5  Click the **cross** at the top right of the window to close the window

You will need re-open a new browser, navigate to [www.nhs.net](http://www.nhs.net) and use your new password when you next log into the portal. Remember to update this new password on all additional devices e.g. mobile to avoid future lock outs

### Additional Information

**Password Requirements:**
- Password must NOT include your username (pre-fix of your email address)
- It must contain a mix of three out of the following four character types:
  - uppercase letters (A-Z)
  - lowercase letters (a-z)
  - numbers (0-9)
  - symbols (!"£$%^&*)
- It must be 8 or more characters long
- It cannot be any of your four previous passwords
- Spaces or commas cannot be used

**Password Expiry Notifications**
- You will be reminded via 18, 10, 5, 2 and 1 day(s) before your password expires to change your password. If you do not change your password you will be locked out of your account and will need to contact your Local Administrator to get your account re-enabled.

**Self-Service Password Reset**
- If you have forgotten your password, you can reset it by using the self-service password reset feature. You will need to know the answers to your security questions and have registered your mobile number on the portal. Refer to the [Self-service Password Reset](http://www.nhs.net) for more information.
Using the NHS Directory

You can use the NHS Directory to search for the details (email, telephone number, pager, organisation details) of other colleagues who use NHSmail. You will also be able to search for shared mailboxes, distribution lists and NHS Directory contacts. You may, for example, want to search the NHS Directory if you are looking for email or telephone details of a specialist in another hospital for an onward referral.

To search for an entry within the NHS Directory:

1. Click **People Finder** in the navigation bar at the top of the screen.

2. Type your **own name** *(Last Name space First Name)* into the search box and press the **Enter key**.

Handy Hint

If you need to narrow your search further, use the **Advanced Search** icon. Choose the criteria to be used from the drop down menus, for example **Type** and then **User**. To add further criteria, for example, **Role, Specialty**, click the **Add Rule** icon and choose the appropriate options from the drop down menu.

Note: You can also search on organisation by selecting **Organisation** from the first drop down menu and then typing the organisation’s name (or part of its name) in the next box.
Using the NHS Directory

3 Click on the account name to view further information

The search will display all the results that match your search criteria

After clicking on the account name, you will see the following information

DEER, John (Aintree University Hospital)

About Me
My name is John Deer and I am an Assistant Practitioner in Aintree University Hospital for 7 years.

Get in Touch
john.deer@aintree.wks.accenturenhs.co.uk
Telephone: 07927283718
Mobile: 07927283718
Page: 07927283718
Fax: 07927283718
Web page: http://www.lakemooronhtrust.com/

Organisation
Aintree University Hospital
Address:
Aintree University Hospital
Aintree University Hospital, Lower Lane, Liverpool, Merseyside, L9 7AL
Devon
0987654321

Site: Cathedral
Site Type: DMU
Roles: Assistant Practitioner
Clinical Specialties: Assistant/Associate Practitioner
Work Area: Acute Medicine
Using the NHS Directory

**Handy Hint**

You should use the NHS Directory to ensure you are contacting the correct person by looking at their Organisation. This is important when two users have the same name.

When searching the NHS Directory for a contact entry, you will be able to tell they are a contact and not a NHSmail user as it says (Contact) after their name and there is a contact book icon next to their name as per the screenshot below:
Managing Shared Mailboxes

A shared mailbox (also known as a generic 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). If you are the owner of a shared mailbox, you can add and remove members and owners to the mailbox. To set up or delete a shared mailbox or change any other setting, contact your Local Administrator.

To manage your shared mailbox:

1. Log in to your NHSmail account via the Portal
2. Click **Profile** in the navigation bar at the top of the screen
3. Click **Shared Mailboxes** at the top right of the screen
4. Click the **Magnifying Icon**

A list of mailboxes that you are an owner of will be listed automatically

5. Click the **Display Name** of the mailbox you want to manage
Managing Shared Mailboxes

6. Click the **Add** to add Members or Users to the shared mailbox

You can also remove members or users by clicking the red cross next to their email address

7. Type the user’s name into the search box

Refer to the *Searching for an Entry* section for more information

8. Click **Update** at the bottom of the page
Creating a static distribution list

A static distribution list is used to send an email to more than one person. It consists of recipients that have been manually added and remains unchanged until you add or remove new recipients. You can also include recipients external to the NHS. This is different to a dynamic distribution list which automatically updates recipients based on specific NHS Directory criteria. When you create a new static distribution list it will be added to the Directory. All distribution lists you create will need to be approved by your Local Administrator. You will receive an email notification as soon as the distribution list has been approved and is live.

To create a static distribution list:

1. Click Profile in the navigation bar at the top of the screen.

2. Click Distribution List at the top right of the screen.

3. Click Add in the top left of the screen and select Static Distribution List from the drop down menu.

Your organisation will already be selected from the drop down menu.

4. If you know the organisational unit the distribution list belongs to, click the + box to expand the Organisational Unit list and select a Organisational Unit and click Ok.

An Organisational Unit refers to the department, ward, building or site that are within your organisation.
Creating a static distribution list

5. Type in the **Name** of the Distribution List

Names must be less than 15 characters and contain no spaces or special characters
The email address will be created automatically, using the organisation’s short code followed by the name you entered for the distribution list

6. **Select Add** next to **Owning Users** to add owners to the distribution list

You can add yourself as an owner by simply ticking “Add Myself As Owner”

7. **Type the user’s name into the search box**

Refer to the **Searching for an Entry** section for more information

8. **Select the owning user by checking the box to the left of the user’s display name**

To add multiple owners, tick the box next to their name

**Warning**
The owners of the distribution list you create must be inside your organisation

9. **When all distribution owners are checked click Select**

If you accidentally add a user as an owning user, you can remove them by clicking the red cross to the left of their email address

10. **Select Hide this group from address lists** if you would not like the distribution list to display in address lists
Creating a static distribution list

11. Enter the **Description** for the distribution list in the text box

This description will be seen when a user searches the Directory for the distribution list, so please make the description informative. There is a character limit of 250 including spaces

Adding authorised senders to static distribution lists

You must set who will be authorised to send to the static distribution list you create.

To set authorised senders:

1. Select whether the **authorised senders** will be **inside your organisation, inside and outside your organisation** or select **Specific Senders Only**

If you select **Specific Senders Only** you will need to add their email address into the appropriate box and select Add. Their names will then appear in the Authorised Senders box

**Only senders inside my organisation:** all users in your organisation will be able to send emails to the distribution list

**Senders inside and outside of my organisation:** all users inside and outside your organisation will be able to send emails to the distribution list

**Specific Senders Only:** this allows you to specify which users are able to send emails to the distribution list

2. Use the **search box** to find and select authorised senders by checking the box to the left of the user’s display name

Refer to the **Searching for an Entry** section for more information

3. Click **Select** at the bottom of the page once all authorised senders have been selected
Creating a static distribution list

Adding recipients to static distribution lists

To add a recipient to a static distribution list:

1. Click Add

2. Use the search feature or the navigation features to find the required recipients

3. Select Recipients for the Distribution List by checking the box to the left of the user’s display name

When a recipient is successfully added to the distribution list their name will appear in the Members box

4. When all recipients are checked click Select

Check that all details for the distribution list are correct

5. Select Complete at the bottom of the page

The below notification will pop up indicating that the distribution list has been sent for approval by Local Administrator

Once your Local Administrator has approved or rejected your distribution list, you will receive an email notification to say whether or not the distribution list is now live

Additional Information

- There is a maximum number of 20,000 recipients for a static distribution list
- For information on how to Edit a static distribution list, refer to Editing a distribution list
- Any change requires re-approval when the membership increases by more than 250 from what was previously approved list
- No re-approval is needed for a decrease in membership
Editing a static distribution list

You can update information associated with a static distribution list (e.g. name, owning users, recipients) registered to your organisation. Once a static distribution list is updated, the changes will apply to all future emails sent to this list.

To edit a static distribution list:

1. Click **Profile** in the navigation bar at the top of the screen.

2. Click **Distribution List** at the top right of the screen.

3. Type the name of the distribution list in the search box. Refer to the *Searching for a Distribution List* section for more information.

4. Click on the **Name** of the static distribution list to open the Edit Static Distribution List Page.

<table>
<thead>
<tr>
<th>Name</th>
<th>Owner</th>
<th>Hidden</th>
<th>Type</th>
<th>Email</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>LakemooreNurses</td>
<td><a href="mailto:tommy.bearmane@dev4.wks.accenturehs.co.uk">tommy.bearmane@dev4.wks.accenturehs.co.uk</a></td>
<td>false</td>
<td>Static</td>
<td>In: <a href="mailto:LakemooreNurses@dev4.wks.accenturehs.co.uk">LakemooreNurses@dev4.wks.accenturehs.co.uk</a></td>
<td>Active</td>
</tr>
</tbody>
</table>
Editing a static distribution list

Click on the Name of the static distribution list to open the Edit Static Distribution List Page

Although the Edit Distribution List page (shown below) looks slightly different to the Create Static Distribution List page, the steps to edit a static distribution list are the same as when you create one (with the exception of Directory Properties). Refer to the Create Static Distribution Lists for more information on editing each part of a distribution list. Refer to the Importing a list of users to update a static distribution list if you have a number of changes to make to the recipient list.

When all editing is complete:

Click Update at the bottom of the Edit Distribution List page

Additional Information

• Refer to Create Static Distribution Lists for more information on policies and best practice
Editing a static distribution list

Importing a list of users to update a static distribution list

If you are the owner of a static distribution list(s) and you have a number of changes to make to the recipient list, you can quickly update it by importing a file containing the new email addresses. The current recipients will be replaced by those on the list you import.

Note: When you use Import Recipients to update a static distribution list, all the existing email addresses will be overwritten by those on the imported list. However, you can ADD new recipients to an existing list, by exporting the current list, adding the new recipients to the bottom of the exported list and importing the consolidated list back into NHSmail. This is explained below. You can also follow this process to remove existing recipients from the static distribution list.

To import users to a static distribution list

1. Click Profile in the navigation bar at the top of the screen

2. Click Distribution List at the top right of the screen

3. Type the name of the distribution list in the search box

Refer to the Searching for a Distribution List section for more information

4. Click on the Name of the static distribution list to open the Edit Static Distribution List Page
Editing a static distribution list

In order to make changes to an existing static distribution list via Import Recipients function, the existing recipient list first needs to be exported (downloaded) via Export Recipients function.

To export (download) the recipients list:

5. Click on Export Recipients under Actions box

Once you export the recipients list, a CSV file will be downloaded and will appear at the bottom left/right corner of the computer screen. Open the file and you will find a list of existing recipients of the distribution list. To add new recipients to the list, add all the new recipients to the bottom of the exported list. To remove existing recipients, simply remove the recipient’s email address from the list. Then save the file (Excel) in your computer and follow next step to import recipients to the distribution list.

To import the recipients list

6. Click on Import Recipients under Actions box

Note: The format of the CSV file you import must be the same as the RecipientList.CSV provided when you click the ‘Export Recipients’ button. That is, it must be in a single column with “Email Address” as the header row.
Editing a static distribution list

Warning
No changes should be made to the format of the file, that is the header column “Email Address”. Any change should only be made to the list of the recipients by adding or removing recipients email addresses.

7 Click on Browse

8 When you have found the CSV file, click on it and click Open
Editing a static distribution list

9 Click on Upload

The following message will be displayed if the upload is successful:

Distribution List Recipient Import Results

3 of 3 recipients successfully imported

The following message will be displayed if the upload is unsuccessful:

Distribution List Recipient Import Results

Email xxxxx contains error "EmailAddress is invalid"

Additional Information

- A Static Distribution List which is already approved, when edited to consist less than 250 users in total, will not need to be approved again.
Creating a dynamic distribution list

Dynamic distribution lists are created from a number of pre-set rules and groups defined by the distribution list owner. When an email is sent to a dynamic distribution list, it will be delivered to everyone within the NHS Directory (i.e. NHSmail) who matches the criteria defined for the group.

Whereas static distribution lists have a list of pre-defined recipients, dynamic distribution lists will deliver to recipients who match the criteria at the time the email is sent. The advantage of a dynamic distribution list is that it accesses live data from NHSmail Portal and therefore does not require active maintenance by the owner e.g. if people leave or join the organisation. However, unlike static distribution lists, it is only possible to set up dynamic distribution lists to include recipients on the NHSmail platform.

Examples of scenarios in which dynamic distribution lists might be helpful include a clinical commissioning group who wants to contact all Chief Execs across multiple organisations, setting up a mailing list for a multidisciplinary teams within the same organisation and a user wanting to contact everyone within their organisation.

There is no maximum number of users that can be included in a dynamic distribution list, but larger groups may need to go through an internal process of approval. When setting up dynamic distribution lists for a large number of users, the following controls are in place to ensure that these lists are checked and approved before they can be used.

Dynamic distribution list controls

<table>
<thead>
<tr>
<th>Condition</th>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Dynamic Distribution List has more than 500 recipients</td>
<td>The distribution list must have specific senders set, such that only the specified senders will be able to send emails to the distribution list</td>
</tr>
<tr>
<td>The Dynamic Distribution List has more than 50,000 recipients</td>
<td>When the distribution list is initially set up and with every subsequent change, it must be approved by a Global and Tenant Administrator</td>
</tr>
<tr>
<td>The Dynamic Distribution List has recipients in multiple organisations</td>
<td>When the distribution list is initially set up and with every subsequent change, it must be approved by a Local Administrator from each organisation. Note: For GP practices the approval shall come from the Parent Organisation, and not the Practice itself</td>
</tr>
<tr>
<td>A user who is not an Administrator sets up or makes a change to the Dynamic Distribution List</td>
<td>When the distribution list is initially set up and with every subsequent change, it must be approved by a Local Administrator</td>
</tr>
</tbody>
</table>
Creating a dynamic distribution list

1. Click **Profile** in the navigation bar at the top of the screen

2. Click **Distribution List** at the top right of the screen

3. Click **Add** in the top left of the screen and select **Dynamic Distribution List** from the drop down menu

4. If you know the Organisational Unit the distribution list belongs to, select an Organisational Unit (you may have to click the + to see lower levels of detail) and click **OK**

Your organisation will already be selected from the drop down menu

An Organisational Unit refers to the department, ward, building or site that are within your organisation

**Handy Hint**
You can click minus sign (-) to collapse the list of Organisational Units to make the page easier to navigate
Creating a dynamic distribution list

5 Type the Name of the distribution list

The email address will be generated automatically, using your organisation’s short code followed by the name you entered for the distribution list.

Note: Names must be less than 50 characters and contain no spaces or special characters. You cannot use the same name as that of another distribution list that is Active / Pending / Rejected.

6 Click Add next to Owning Users

Note: you can only have one Owning User. If you already have an owning user, you must first remove them by clicking the red cross next to their name.

7 Search for the Owning User and click the tick box next to their name and click Select

Note: you can only have one Owning User. If you already have an owning user, you must first remove them by clicking the red cross next to their name.

8 Enter a Description for the Distribution List

Users will see this description when searching for the distribution list in the NHS Directory. There is a character limit of 250 including spaces.
Creating a dynamic distribution list

Setting authorised senders

1. Choose the category of authorised senders for this distribution list

   - Only senders inside NHSmail: all users on the NHSmail platform will be able to send emails to the distribution list
   - Senders inside and outside of NHSmail including the Internet: all users inside and outside of NHSmail including anyone on the Internet will be able to send emails to the distribution list
   - Specific Senders Only: this allows you to specify which users are able to send emails to the distribution list. Note: you must select this if your distribution list will contain more than 500 recipients

Warning
Be aware that if you select Senders inside and outside of NHSmail including the Internet any email address will be able to send emails to the distribution list

Only senders inside NHSmail: all users on the NHSmail platform will be able to send emails to the distribution list

Senders inside and outside of NHSmail including the Internet: all users inside and outside of NHSmail including anyone on the Internet will be able to send emails to the distribution list

Specific Senders Only: this allows you to specify which users are able to send emails to the distribution list. Note: you must select this if your distribution list will contain more than 500 recipients

If you choose Specific Senders Only:

2. Click Add next to Authorised Senders

3. Use the search box to find the account you wish to authorise
   Tick the names of all the authorised senders you want to add and then click Select
Creating a dynamic distribution list

Adding recipients to Dynamic Distribution Lists

Recipients are added to dynamic distribution lists based on a number of rules that can be grouped together. You can add multiple groupings of rules to distribution lists.

To add a new rule:

1. Click Add Rule

2. Select the first condition for the rule using the first drop down list (e.g. Work Area)

3. Select from the drop down whether the condition is ‘equal to’ (=) or ‘not equal to’ (!=)
Creating a dynamic distribution list

4 Select the second condition for the rule from the drop down list (e.g. Acute Medicine)

Based on the rule above, all users within the NHS Directory who have the work area of Acute Medicine would be added as recipients to the distribution list.

You may wish to add additional rules e.g. recipients must work in Acute Medicine in your organisation. To set additional rules within the same group:

5 Click Add Rule and repeat steps 1-4. Select AND from the drop down if all rules must apply / Select OR if at least one rule must apply.
Creating a dynamic distribution list

If OR is selected at least one of the subsequent rules need to apply to the user e.g. if you select Role = Midwife Consultant OR Role = Midwife Manager, it would go to users who are either Midwife Consultants or Midwife Managers.

If AND is selected, all subsequent rules must apply to the user in order to be added to the distribution list e.g. if you select Organisation = Aintree University Hospital AND Work Area = Acute Medicine it will go to everyone working in Acute Medicine in this hospital.

Handy Hint
If you do not include organisation in your rules, you need to use country to avoid the distribution list including recipients in both England and Scotland

Handy Hint
You can click **Delete** next to the rule you want to delete

Grouping rules

Grouping rules allows you to apply multiple rules to determine dynamic distribution list recipients. A group belongs to the rule that sits above it. When you select the AND / OR in the rule that sits above any group, you determine whether all rules and any groups sitting beneath the rule must be true or if only one of the rules or groups needs to be true.

To group rules together:

1. Click **Add Group** and repeat steps 1-5 from the previous section to set the rules for the second group

In the example above if a user is part of Aintree University Hospital AND the user is either Administrator OR Administrative Assistant, they will be a recipient of this distribution list.
Creating a dynamic distribution list

Handy Hint
You can click **Delete Group** next to the group you want to delete. You can also delete individual rules within a group rather than deleting the entire group.

Viewing Dynamic Distribution List Recipients

Viewing the target users will help you understand who the recipients of the distribution list will be. You should always review target users as it allows you to determine whether the rules in the distribution list are appropriate to include your target audience. It will also help you determine what controls will apply to the approval of this distribution list. To view all target users of the distribution group:

1. Click **View Target Users** at the bottom of the page

2. When you have reviewed the target users and are satisfied, click **Back**

3. Click **Complete** on the Dynamic Distribution Creation page

Depending on the number of recipients and whether there are recipients across multiple organisations, the distribution list may need to be approved by a Global or Tenant Admin or by Local Administrators in other organisations. Refer to **Dynamic distribution list controls** for more information

**Warning**
If there are many target users, you may experience a delay in loading this page. Only the first 500 recipients will be shown along with an indication of the total number of recipients.

**Additional Information**
- Dynamic distribution list rules will only apply to users with an NHSmail account and not NHS Directory contacts
- Contacts can not be added as Senders or Owning Users
Editing a dynamic distribution list

If you are the owner of a dynamic distribution list, you can update information associated with it (e.g. name, owning users and membership rules). Following an edit to a distribution list, this will have to be sent for approval again. On approval, the distribution list is updated and the changes will apply to all future emails sent to this list.

To edit a dynamic distribution list:

1. Click **Profile** in the navigation bar at the top of the screen.

2. Click **Distribution List** at the top right of the screen.

3. Type the name of the distribution list in the search box. Refer to the *Searching for a Distribution List* section for more information.

4. Click on the **Name** of the dynamic distribution list to open the Edit Distribution List page.

**Warning**
You cannot delete distribution lists. If you need to delete a distribution list contact your Local Administrator.

**Self-service distribution lists**

Approved distribution lists will show a status of **active**. Distribution lists yet to be approved by your Local Administrator will show a status of **pending**.
Editing a dynamic distribution list

Although the Edit Dynamic Distribution List page (shown below) looks slightly different to the Create Dynamic Distribution List page, the steps to edit a dynamic distribution list are the same as when you create one (with the exception of Directory Properties). Refer to the Creating a dynamic distribution list for more information on editing each part of a distribution list.

The Edit Dynamic Distribution List page includes a Status box which indicates if the list is active/inactive, the dates it was created and last updated.

When all editing is complete:

5. Click **Update** at the bottom of the Edit Distribution List page

**Warning**
Clicking **Update** even if you have not made any changes will send the list for re-approval. Please choose **Cancel** to close the Edit page without making changes.
Searching for a Distribution List

If you want to edit (e.g. add or remove members) any distribution lists you manage, you first need to find that list by using the Search function. You can also search in the distribution lists you manage, for those that contain the name of specific members. This search feature is the same for both static and dynamic distribution lists. You will only be able to search for Distribution Lists and their members (i.e. owners, authorised senders and recipients) that you have created in your organisation. If you want to add users to one of your distribution lists, search for the list first as explained below and then refer to Editing a Distribution List.

To search for an entry:

1. Navigate to the Distribution Lists screen

For more information on creating and editing distribution lists refer to: Creating a static distribution list, Creating a dynamic distribution list and Editing a distribution list

2. Type the user or distribution list name in the search box in the top right of the page and click the magnifying glass

You can also use the navigation features at the bottom left of screen to view more users per page (10, 25, 50) or click the numbers in the bottom central of the screen to move through the different pages of users.

Handy Hint
If you need to narrow your search further, use the advanced search or click Display Name in the tool bar to sort the list in alphabetical order.

Refer to the Advanced Search section for more information on using this feature.

3. Click on the distribution list you want to edit
Advanced Search for Distribution Lists

When searching for a particular distribution list or the owners of that list, if the Simple Search feature displays too many Directory entries, you can use the Advanced Search feature to refine your search using multiple criteria. You can also use the column picker to refine the search. Refer to the section Using the Column Picker for more information.

Note: You will only be able to search for Distribution Lists and their members (i.e. owners, authorised senders and recipients) that you have created in your organisation.

To use the Advanced Search feature:

1. Navigate to the Distribution Lists screen.

For more information on creating and editing distribution lists refer to: Creating a static distribution list, Creating a dynamic distribution list and Editing a distribution list.

2. Click Advanced Search at the top right of the page.

You can search by typing your criteria in the fields that are displayed at the top of this screen. If you want to change, add or remove fields, refer to Using the Column Picker.

3. Type your search word(s) into the corresponding display field text box (e.g. type Tommy in the Name textbox).

The results of the search will be displayed on the screen. You can search based on more than one display field at a time.

To go back to viewing the full list of users, delete the text from the search display fields(s).
Using the Column Picker

The column picker can be used to customise the display fields that you can see when browsing lists within the Portal. This makes navigating and searching within different lists easier. There is a column picker on the Distribution List creation screen.

To use the column picker:

1. Navigate to the Distribution Lists Screen

For more information on creating and editing distribution lists refer to: Creating a static distribution list, Creating a dynamic distribution list and Editing a distribution list.

2. Click Column Picker at the top right of the page

3. Select the display fields you wish to view by ticking the box to the left of the field name

4. Click OK

Once you have set your display fields, these settings will remain for the next time you log into the Portal.
Searching for a NHSmail Portal entry

When performing actions such as adding a user to a distribution list you will need to search for the entry in the Portal. This search feature is consistent across the user management, contacts and distribution list screens so it will become a familiar action to complete. The example below is for finding a user to add to a distribution list.

To search for an entry (e.g. user, contact or distribution list):

1. Navigate to the Distribution Lists screen

2. Type the user or distribution list name in the search box in the top right of the page and click the magnifying glass

You can also use the navigation features at the bottom left of screen to view more users per page (10, 25, 50) or click the numbers in the bottom central of the screen to move through the different pages of users.

Handy Hint
If you need to narrow your search further, use the advanced search or click Display Name in the tool bar to sort the list in alphabetical order.

Depending on the action you need to complete, you will select your desired entry by either ticking the box to the left of the name of the target object or double clicking on it.
Finding your Local Administrator

Local Administrators (LA) are the prime contacts responsible for the administrative duties relating to your NHSmail account. For example, unlocking your account, setting up shared mailboxes and authorising distribution lists. You can usually find your LA by contacting your local IT support, however you can also use the People Finder (NHS Directory) within the NHSmail Portal to find the names and contact details of the LAs for your organisation.

To find the details of your LA:

1. Log into the NHSmail Portal at [www.nhs.net](http://www.nhs.net)

Note: if you are using a secure N3 or SWAN connection to access the Portal, you will not need to log in to access the People Finder (NHS Directory).

2. Click People Finder in the navigation bar at the top of the screen.

3. Type your own name (Last Name space First Name) into the search box and press the Enter key.

Handy Hint

If you need to narrow your search, click on the Advanced Search icon. Choose the criteria to be used from the drop down menus, for example Organisation and type all or part of your organisation’s name in the next box. You can add further criteria, for example, Role or Specialty by clicking the Add Rule icon and choose the appropriate options from the drop down menu.
Finding your LA

Finding your Local Administrator

Note: You can also search on organisation by selecting Organisation from the first drop down menu and then typing the organisation’s name (or part of its name) in the next box. After search results appear, follow Step 4-6 to find out details of LAs that work in the organisation.

4. Click on your **name** to open your NHS Directory entry

![DEER, John (Aintree University Hospital)](image)

5. Click on your **Organisation’s Name**

![Aintree University Hospital](image)

A screen containing the details of your Organisations will load. From this screen you can view a list of LAs that work at your organisation.
Finding your Local Administrator

To retrieve the contact details of your LA:

6. Click on the name of the LA you wish to contact

Get in Touch

✉️ local.admin@intf.wks.accenturenhs.co.uk

Telephone: 01726536748
Mobile: 07826354758
Pager: 78765567
Fax: 01726536766

View the LA’s email address, telephone, mobile, pager, fax numbers and website under the Get in Touch section

Additional Information

You can also view the Parent Organisation, Organisation Units, Sites and Child Organisations associated to your organisation under Related Items. Click on any Related item to view the information