

NHSmail Calendar Federation

**Guidance, FAQs and technical information
on how to federate with NHSmail**

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Introduction

This document provides organisations, seeking to federate with NHSmal Calendar, with a list of common questions and answers on federation. The document also provides a summary of the on-boarding, support and disconnection (de-federation) processes.

Overview

The NHSmal service has been designed to enable interoperability with third-party systems. NHSmal Calendar is one key area of the service where interoperability holds significant value in enabling collaboration across health and social care:

- NHSmal Calendar federation enables NHSmal users to view free and busy information within the calendar between users in a partnering organisation that has federated calendars.
- Federated contacts can only view, by default, the free and busy information within the calendar. The individual users can opt to share increased visibility to make the location and subject fields within their calendar available if they choose to.
- Calendar federation is controlled by security configurations that must be reciprocated between NHSmal and partnering organisations.
- NHSmal Calendar federation requires the consent and correct configuration of both parties of the federated relationship, which will need to be completed by the Microsoft Exchange system administrators; Accenture on behalf of NHS Digital.
- Currently, federation with NHSmal is only being offered to those organisations operating in a health and care setting, for example, local authorities, publicly funded health services, pharmacies etc.
- NHSmal Calendar federation will only be offered to health and care organisations operating with Microsoft Exchange 2010 SP3 or higher.

Terminology

Interoperability - the ability of computer systems or software to exchange and make use of information.

Federation - functionality which allows users to communicate with others outside their organisation.

Authorised signatory - officer or representative vested (explicitly, implicitly, or through conduct) with the powers to commit the authorising organisation to a binding agreement.

Federation partner & Partner - organisation with which calendar federation / sharing is enabled between.

Federation Partnership Agreement (FPA) - a formal document agreeing the federation between the partner organisations.

Domain Name System (DNS) - the Internet's system for converting alphabetic names into numeric IP addresses.

De-federation - the process of disconnecting the link to NHSmal calendar federation service.

End-user - user of the calendar service.

Single Point of Contact (SPoC) - a person or department serving as the co-ordinator or focal point of information, concerning an activity or program. For calendar federation, the SPoC is each organisation's local helpdesk purposed for providing IT support.

Guidance and process flows to federate / de-federate

High level federation process for NHSmail Calendar

Organisations wishing to federate with the NHSmail Calendar service must demonstrate that they:

- work in a health and care environment and the system will be used for such purposes
- hold a level of information governance maturity
- will confirm by signing up to the federation partnering agreement that organisations hold an appropriate level IGSoC level 2 or an equivalent e.g. PSN CoCo. Organisations should read the [Calendar federation](#) section later in the document, to understand the requirements for federation.

The above will be demonstrated by signing and accepting the terms set out in the Calendar Federation Partnership Agreement.

Process for organisations seeking to federate with NHSmail Calendar:

- The process starts by emailing feedback@nhs.net to raise a request. Please detail firstly the Microsoft Exchange infrastructure in use and secondly, the health and care use in the initial request.
- If the federation request meets the acceptance criteria as demonstrated above, the NHSmail team will respond with a Calendar Federation Partnership Agreement (FPA) which must be completed and signed by an authorised signatory for your organisation.

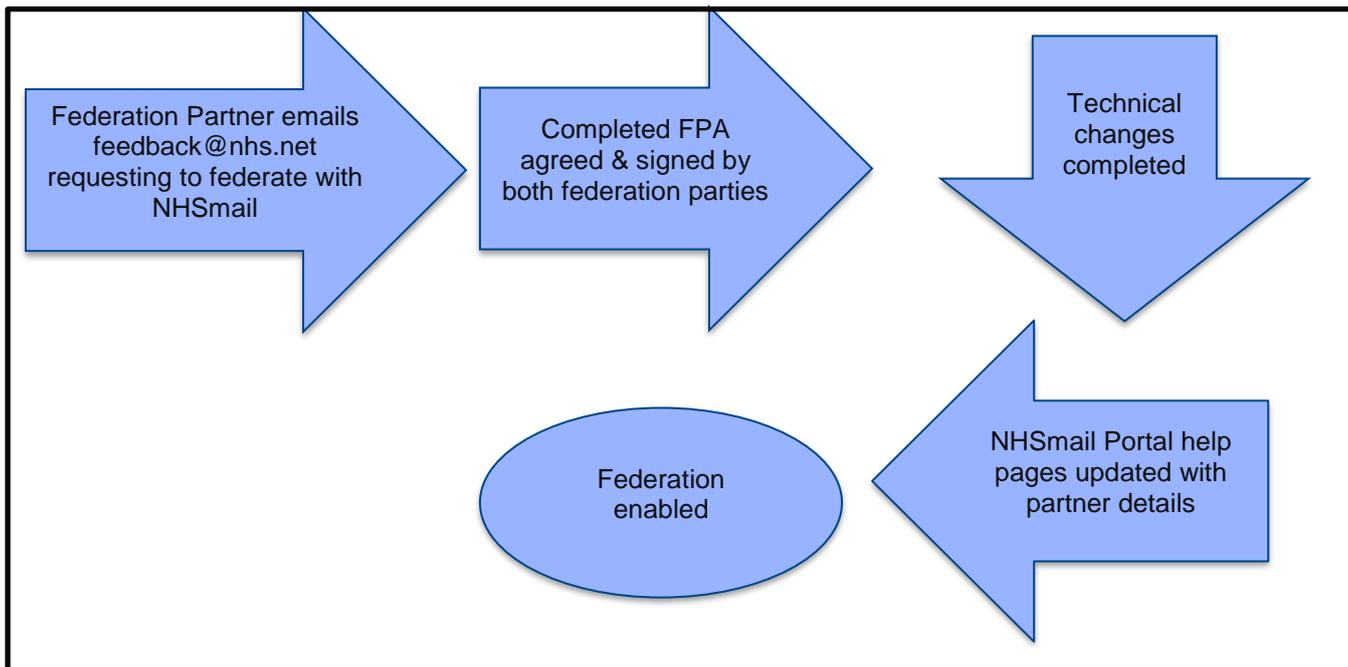
If the request doesn't meet the acceptance criteria, the organisation will be informed why it cannot federate with NHSmail.

- Once completed and signed, please return the FPA to feedback@nhs.net. The FPA will be reviewed by NHSmail and, if approved, the request will be submitted to the NHSmail technical team who will advise when the federation will be enabled. Any concerns identified at the point of submission will be communicated back to the federation partner.

Please note: In terms of expected timescales, all federation requests approved for implementation will be processed on the second Wednesday of the month, with the change taking up to 10 days.

- Upon enablement, the NHSmail technical contact will liaise with the federation partner's technical contact to perform testing to ensure the service is operational.
- Upon successful federation, NHSmail will publish details of federated organisations on the NHSmail Portal help pages, including the name of the organisation, date federated and the federated partner's statement on their intended use of the federation service.

Process representation for federation



High level de-federation process from NHSmail Calendar

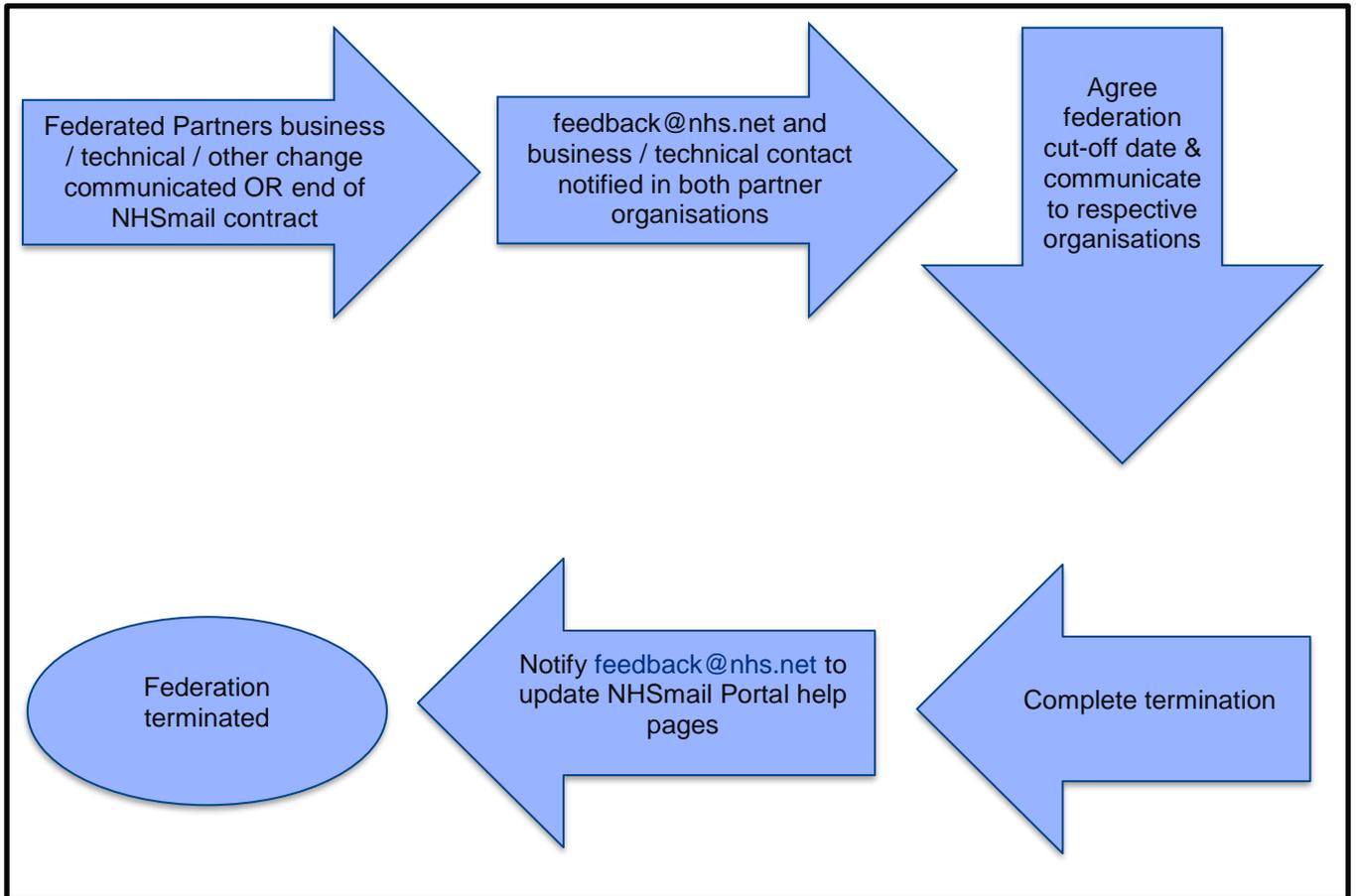
Once federation is in place, there are two ways a federated partner can have their federation suspended or revoked:

1. The term of the NHSmail contract with the current NHSmail delivery partner coming to an end which will invoke the process to remove federation services with the federation partner.
2. If there is a change in the business, technical or operational infrastructure of the federated partner organisation, for example, if the federated partner ceases to trade, there is a change in ownership, change of name, technology / security change or anything that would require a new application for federation.

In the second scenario, for revoking federation, it is the responsibility of the federated partner to notify NHSmail via feedback@nhs.net within 48 hours of any unplanned changes or issues occurring and within 24 hours of any planned changes being agreed. The appropriate contact identified within the FPA must notify their counterpart within the organisation using NHSmail.

There is no formal requirement for the renewal of an FPA. It is the partner organisation's responsibility to notify NHSmail to remove federation or of any changes with the partner (in line with the de-federation process outlined) that impact the federation.

Process representation for de-federation



Support model for federated organisations

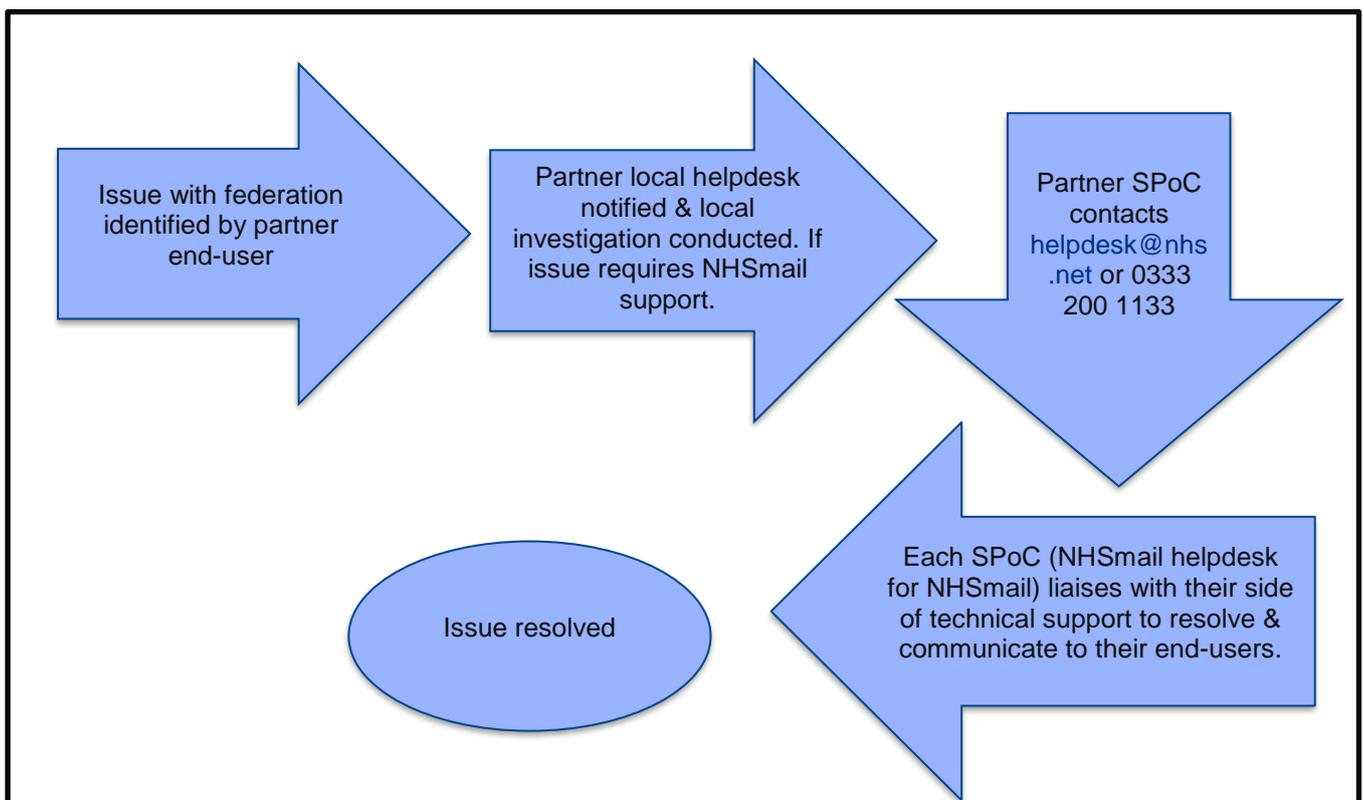
If issues are experienced with the federation service, such as a partner end-user is unable to access an NHSmal user's calendar, the partner should:

- contact the NHSmal user whose calendar they wish to view
- ask the user to check their calendar settings to ensure shared calendar permissions have been set appropriately.
- contact their own organisation's support desk to raise a fault, if access is not blocked. The partner's support desk will provide support in the first instance, using their internal escalation process
- arrange for their SPoC, using the contacts identified in the FPA, to escalate the issue with the NHSmal national helpdesk, if the investigations by the partner identify that the issue lies with the NHSmal service. The NHSmal helpdesk will follow its standard process to identify and resolve the issue.

NHSmal are only able to investigate issues on the NHSmal side of the connection.

If there is a change in SPoC at the partner organisation, it is the partner's responsibility to notify NHSmal through helpdesk@nhs.net. Only the identified contacts within the FPA are authorised to request information or support from NHSmal.

Process representation for helpdesk support



Calendar federation

The NHSmail Calendar federation service uses the Microsoft Azure platform to allow the safe access to calendars across organisations using Microsoft Exchange 2010 SP3 or newer. The configuration information below supports an organisation in enabling the calendar federation service. The federation will be enabled upon successful approval of the federation partnership organisation.

Governance responsibilities

As with all systems controls can only go so far, so users should always be aware of their individual responsibilities in relation to information governance and clinical safety. Users must act in accordance with their own organisational governance and clinical safety policies and processes. The NHSmail [Acceptable Use Policy \(AUP\)](#) also provides guidance on calendar federation.

The NHSmail service has calendar access limited by default to free / busy visibility through the scheduling assistance. Individuals are empowered to increase the level they wish to share to include location and subject information within the Outlook calendar view. This does not mean that federated organisations operate with the same criteria. Some may have limited to no access by default, or full access.

The recommendation from the NHSmail service is for users to not share or store any sensitive or confidential information within calendar entries. This also includes ensuring subject field within the calendar entry are specific to the meeting and not including any sensitive or confidential information.

Frequently Asked Questions (FAQs)

Federating with NHSmail Calendar service

Q What is NHSmail Calendar federation?

A Calendar federation allows health and care organisations to connect to the NHSmail platform to collaborate with sharing access to calendar information. NHSmail calendar data is limited to free / busy by default and individuals have the option to increase the visibility to share location and subject information. For example, a council may have their own Microsoft Exchange 2010 SP3 or higher platform. By federating with the NHSmail platform, this will allow council employees to view the calendar information of their colleagues on the NHSmail platform.

Q What guidance is available to enable federation?

A All technical information required to enable federation with the NHSmail Calendar service is included within the FPA and will be provided on request.

Q Our organisation provides publicly funded health and care but does not use Microsoft Exchange 2010 SP3 or higher as its primary email system. Can we still federate with NHSmail?

A No. Unfortunately due to the technology used to manage federation, it is only possible to federate with third party email systems on Microsoft Exchange 2010 SP3 or higher.

Q How do we start the federation?

A The process is started by contacting feedback@nhs.net with a request to federate calendars.

Q If we federate with NHSmail, does that mean we will have access to all other organisations that have also federated with NHSmail?

A No. Users within your organisation will be able to view NHSmail users' calendars only. NHSmail users will however be able to view the calendars of all those organisations that have an active federation with NHSmail.

Q When I am trying to locate a calendar for a person within the federated partner's organisation, why are they not displayed like contacts within my organisation?

A We are only federating at a Microsoft Exchange level which means the full email address of the person you are wishing to access the calendar for will be required to locate them. To have the facility to search by the contact name, your organisation will need to enable the NHSmail address book synchronisation which is due for release summer 2018. Further details will be made available once it is live. By default, free/busy information is available for an NHSmail user visible through the scheduling assistant only.

Q Will federation enable access to contacts using Skype for Business (SfB) Instant Messaging & Presence (IM&P) between NHSmail and federated organisations?

A Federating with NHSmail Calendar will not automatically allow federation with SfB. SfB federation is available through a separate application process which can be obtained via feedback@nhs.net.

For further information see the guidance on [Federating Skype for Business](#).

Q How long will it take to enable federation?

A Once you complete the Federation Partnership Agreement (FPA) and submit it to feedback@nhs.net, you will be notified of approximate timelines for federation enablement. As a rough guide, federation requests are submitted to the NHSmail supplier once a month and federation completes at the end of the month.

Technical requirements & synchronisation

Q What information do I need to provide to NHSmail?

A You need to provide the information asked for in the Federation Partnership Agreement (FPA) - this includes your technical configuration information to support NHSmail creating the link to allow federation, as well as the contact details required for escalations.

Q What information will NHSmail give to me?

A Technical information to allow the federation will be provided as part of the FPA.

Q What do we need from a technical perspective to federate with NHSmail?

A An organisation will require a fully operational Microsoft Exchange 2010 SP3 or higher implementation. The technical and connection details will be detailed within the FPA. For detailed guidance, please consult the NHSmail [Calendar Federation Configuration Guide](#).

Q I use a different product for email services; can I still federate with NHSmail?

A Currently only Microsoft Exchange 2010 SP3 or higher are supported for federation.

Q I have federation enabled with NHSmail but when opening the calendar of a partner on NHSmail, I get a message "You do not have permission to view this calendar. Do you want to ask <user email> to share his or her calendar with you?"

A NHSmail default sharing level is free/busy which is available by default to all federated partner users through the scheduling assistant. If there is a need to view the calendar of

a federated partner, this must be requested from the individual through the sharing options within their calendar.

Q I have access to a calendar of a partner but when I open the calendar view nothing is displayed?

A Calendar synchronisation can take anything between 15 minutes and 6 hours to synchronise. This is an automated setting which neither partner has any control over.

Q How long does calendar synchronisation take once federation has been enabled?

A Calendar synchronisation can take anything between 15 minutes and 6 hours to synchronise. This is an automated setting which neither partner has any control over.

Before proceeding with calendar federation, housekeeping activities should be undertaken within the organisation to reduce the amount of data that needs synchronising:

- Delete data older than 6 months (recommended)
- Ensure attachments are not stored within calendar appointments (this also protects patient data from being accidentally shared)
- Ensure old calendar appointments are deleted or archived (especially if over 12 months old) as this will reduce the time it takes to synchronise calendars

Technical support arrangements

Q If I have a technical problem with the federation, who do I contact?

A You need to contact your local IT helpdesk who will provide initial triage. If the issue is deemed to belong to the NHSmail service, your local helpdesk (SPoC) will contact the NHSmail helpdesk on your behalf.

Q If I am having a technical problem with my calendar service, who do I tell?

A You need to contact your local IT helpdesk as per your usual organisational support arrangements.

Q My local IT helpdesk advised me that the issue is with the partner's federation, what do I do?

A Your local IT Helpdesk (SPoC) will be responsible for liaising and raising issues related to federation with NHSmail. You need to ensure you maintain contact with your local IT Helpdesk for this issue, as you would do with any other IT issue.

Q Are there any other support resources available?

A Although there are no other documents for calendar federation, if you have a question relating to NHSmail, you may wish to look at our [Portal help pages](#)

Clinical safety

Q What considerations should be given to clinical safety for calendar federation?

A NHSmail Calendar federation users must treat the contents of NHSmail Calendars with due care and consideration, in line with the information governance policies, processes and training they have received. Sensitive data should not be contained in the header or body of any calendar entries.

Q What do I need to do to assure clinical safety for my federated organisation?

A Clinical use of the calendar service must be in line with your organisation's policy for

clinical messaging and storage. Be aware with whom you are sharing access with, in accordance with your professional practice guidance and organisation's information sharing policies.

Q If federated calendars fail or are temporarily unavailable, what would happen?

A You need to notify your local helpdesk, as per your organisation's IT support arrangements and follow any business continuity plans you may have in place.

Connection renewal

Q How often will I need to renew the Federation Partnership Agreement (FPA)?

A There is no formal renewal for the FPA. It is the partner organisation's responsibility to notify NHSmail to remove federation or of any changes with the partner (as per de-federation process outlined) that impact the federation. The partner must ensure their information governance certification remains current and failure to maintain this will result in suspension of federation. Federation will also be suspended when the NHSmail contract with the current delivery partner, Accenture, comes to an end.

Q Who will renew the FPA if there are any changes to my organisation?

A The SPoC (same role that signed the FPA originally).

Q If my organisation has plans to go through a change (business, technical or closing down), will the federation continue?

A Each partner has a duty to notify NHSmail as per the FPA on any changes that may pose a risk to the federation. The partner must notify NHS Digital within 24 hours of a planned change being agreed and within 48 hours of any unplanned changes occurring. The partner must submit an updated FPA as soon as possible, to prevent loss of service.