

NHSmail Migration Communications Plan Template

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Version 2

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1. Purpose

This document sets out a recommended approach for managing the communications around the implementation of NHSmal at [INSERT YOUR ORGANISATION NAME].

2. Scope

This document is aimed at organisations which are migrating from a local in-house email platform to NHSmal, with the intention of making NHSmal the organisation's primary email platform.

It is not aimed at organisations that are already using NHSmal as their primary email platform.

3. Background

[YOUR ORGANISATION NAME] is planning to migrate all email users to the NHSmal service on [DATE].

NHSmal is the centrally funded email and directory service designed for NHS staff in England and Scotland and provided by NHS Digital.

NHSmal can be accessed from any Internet-connected computer as well as via email programmes such as Outlook and mobile devices capable of supporting encryption.

NHSmal provides users with an email account, an online calendar, and access to the NHS People Finder containing contact details of over one million NHS staff and business partners.

4. Objectives

The actions and messages defined in this plan aim to:

- highlight the key features and benefits of NHSmal and therefore encourage buy-in from current email users
- raise awareness of the security issues around patient identifiable information and the need for secure email
- prepare staff for the arrival of NHSmal and ensure they complete key actions that need to be undertaken before migration
- educate staff as to how the changes will / might affect them
- ensure staff are aware of who to contact and where to go for more information, help and support

5. Target audiences

The migration to NHSmal will affect all current email users, as well as any future staff, workflows that include email as part of the process, mobile users, email client users and IT helpdesk staff. Organisations will need to review if all staff require an NHSmal account.

Communications will be split into two areas – general messages around NHSmal and targeted, audience-specific messages.

Audience would include:

- all staff
- all local email users
- all current NHSmail users
- mobile users
- email programme users
- over-quota local email users (their local account size + any NHSmail data they may already have must be under the quota set for them in NHSmail)
- IT helpdesk staff
- application owners, assuming they are known

Local organisations should target clinical / admin / management communities as appropriate.

6. Communications phases

Communications will be split into four phases:

6.1 Raising awareness

Phase one will concentrate on raising general awareness of NHSmail across the organisation and also of the intention to migrate. Messages will be communicated via the intranet, all staff newsletters, all staff emails, banner stand in high traffic areas, posters [DELETE OR AMEND AS APPLICABLE].

6.2 Actions required

Phase two will see an increase in communications activity including targeted communications to the groups identified in [section 5](#).

6.3 Pre-migration

All staff communications will include a timeline of migrations and will emphasise actions that need to be undertaken pre and post-migration via a downloadable information pack. Key messages will also include promoting where to find help and guidance, guidelines around security and the transfer of patient data.

Targeted emails will be sent to users reminding them that they are migrating over the coming weekend, highlighting actions that need to be taken and where to find help and guidance.

6.4 Post-migration

Post-migration communications will focus on ensuring users are aware of security and quota guidelines, where to find help and how to reconfigure mobile devices and email programmes – this will be via a ‘welcome to the service’ email. Targeted communications will be sent to users whose migrations may have failed telling them what happens next.

7. Communications plan & key messages

Note; four months has been used as a guideline length of time that the migration will take from initial engagement to migration completion – this is based on a migration of 5000 users. The dates below should be amended by each organisation depending on the timescales set for their migration.

7.1 Phase 1

7.1.1 Announcement of intention to migrate all staff

Audience:	All staff
Date:	<i>Insert</i>
Owner:	<i>Insert</i>
Comms channel:	All staff email Migration intranet page Intranet front page Newsletter
Actions:	<p>Announcement of intention to migrate to all staff:</p> <ul style="list-style-type: none"> - What is NHSmail? - Why the organisation is intending to migrate - Features - Benefits - What will happen when <p>Future communications to look out for</p>

7.2 Phase 2

7.2.1 Detailed communication

Audience:	All staff
Date:	<i>Month 2</i>
Owner:	<i>Insert</i>
Comms channel:	All staff email Migration intranet page Newsletter
Actions:	<p>Detailed communication – actions required:</p> <ul style="list-style-type: none"> - Reiterate what’s happening and when (publish migration timeline if possible) - Once migration has started even if you haven’t been migrated yet you must monitor your NHSmail account as well as your existing [ORG NAME] account. This is because staff that have been migrated, when replying to a mail you have sent them will find that their reply is directed to your new NHSmail account rather than your [ORG NAME] account - Existing NHSmail users – re-familiarise yourself with your username and password and make sure you can access your account

	<ul style="list-style-type: none"> - Clean up both your NHSmal mailbox and your internal email account. Both added together must be under the NHSmal quota of 4GB by [DATE] or you risk some data not being migrated. - You CAN log into your account over your migration window – no downtime - Your deleted items WON'T be migrated (this depends on the organisation migration plan – edit / delete as necessary) - Any mailbox permissions you have on your in house email account will need to be recreated on your NHSmal account after migration – make a note of them now. Any permissions set on your existing NHSmal account will remain, add any new permissions as needed - If you are a distribution list (DL) owner, then this DL may need to be re-created after migration – make a note of any DLs and their members now. Please note that DLs you have set up in your personal contacts WILL be migrated. Please contact the NHSmal project team to check on the status of your DLs' migration. (Will there be any targeted DL comms?) - What about DL members that haven't been migrated yet? - If you own an in-house shared mailbox which is being migrated to NHSmal, you will need to re-establish permissions after migration. If you access a generic mailbox but don't own it, make sure the owner resets your permissions. Make a note of any shared mailbox permissions now (will there be any targeted shared mailbox comms?) - Please refer to the NHSmal Shared Mailbox Guide. - What about GM members that haven't been migrated yet? <p>This is where to find help and guidance [LINK TO LOCAL GUIDANCE]</p>
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7.2.2 Targeted communication to over-quota NHSmal / local email users

Audience:	Over-quota users (local and NHSmal)
Date:	<i>Month 2</i>
Owner:	<i>Insert</i>
Comms channel:	Targeted email (see appendix 2) Information on migration intranet page
Actions:	<p>Targeted communication to over-quota NHSmal / local email users:</p> <ul style="list-style-type: none"> - Your [LOCAL / NHSMAL] account is over quota - If you don't get your account (NHSmal / local email) under quota by [DATE] your account content won't be migrated and you may not be able to access it in the future - Calendar, contacts and tasks all count towards quota on NHSmal <p>(Add link to local guidance on reducing mailbox size including; local guidelines for storing information)</p>

7.2.3 Targeted communication to mobile users

Audience:	Mobile users
Date:	<i>Month 2</i>
Owner:	<i>Insert</i>
Comms channel:	Targeted email Migration intranet page
Actions:	Targeted communication to mobile users:

	<ul style="list-style-type: none"> - You must synchronise your mobile device before migration - You must reconfigure your mobile device to NHSmal after migration - When connected to NHSmal the device can be remotely wiped if it is lost or stolen, protecting the data it contains <p>Org to add link to local mobile guidance.</p>
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7.2.4 Targeted communication to email programme (Outlook) users

Audience:	Email programme users
Date:	[Month two]
Owner:	<i>Insert</i>
Comms channel:	Targeted email Migration intranet page
Actions:	<p>Targeted communication to email programme [OUTLOOK] users:</p> <ul style="list-style-type: none"> - Test your access to NHSmal over the web (www.nhs.net) – get your account unlocked and password reset if necessary by contacting your local IT helpdesk. - You may need to re-connect Outlook to NHSmal after migration. The Outlook auto-complete file - which suggests email addresses when you start to type in the ‘to’ field of a new email, will be empty in your new Outlook profile - Any rules you have set up in Outlook may need to be recreated after migration - You may need to reset your auto-signature after migration - You may need to reconnect PST files (personal folders in your mailbox) after migration - Your deleted items may not be migrated <p>(Link to local email programme [OUTLOOK] guidance.)</p> <p>All of the above is dependent on the migration methodology chosen by the local project team (if connecting both in-house email and NHSmal through one Outlook profile then the above message may not need to be sent)</p>

7.2.5 Target communication to IT helpdesk staff

Audience:	Helpdesk staff
Date:	[Month two]
Owner:	<i>Insert</i>
Comms channel:	Targeted email Migration intranet page
Actions:	<p>Targeted communication to IT helpdesk staff:</p> <ul style="list-style-type: none"> - When bulk registering users prior to the migration be aware that the account will be visible on the NHS Directory and they may receive mail – tell them to log in and monitor their new account - Training and guidance resources and where to find them <p>See appendix 1 – post-migration user questions and where to find the answer</p>

7.2.6 Targeted communication to application owners

Audience:	Application owners
Date:	[Month two]
Owner:	<i>Insert</i>
Comms channel:	Targeted email Migration intranet page
Actions:	<p>Targeted communication to application owners:</p> <p>If you manage an application that links to an email account i.e. a patient appointment reminder system via the local in-house email system, the link will be broken on migration of the account and will not be automatically re-connected. The email configuration that the application uses to connect will need to be manually updated after migration. The new settings can be found at: [LINK TO LOCAL GUIDANCE]</p>

7.3 Phase 3

7.3.1 All staff email

Audience:	All staff
Date:	<i>Month 3</i>
Owner:	<i>Insert</i>
Comms channel:	All staff email Newsletter piece Link on intranet homepage
Actions:	<p>All staff email:</p> <ul style="list-style-type: none"> - Reminder of timeline of migrations - Guidelines about security [LINK TO LOCAL GUIDANCE] <p>Link to download information pack containing key messages from all user communications phase 1 and headline messages from targeted comms i.e. reset your mobile device after migration</p>

7.3.2 Reminder email to migrating users

Audience:	Users migrating that weekend
Date:	[Week pre-migration]
Owner:	<i>Insert</i>
Comms channel:	Targeted email (see appendix 1)
Actions:	<p>Reminder email to migrating users:</p> <ul style="list-style-type: none"> - You are being migrated this weekend - Make sure you're under quota - Log in to NHSmMail before Monday - This is where to go for help on Monday - This is how to log in over the web

7.4 Phase 4

7.4.1 Welcome Email

Audience:	Migrated users
Date:	Monday after each migration
Owner:	<i>Insert</i>
Comms channel:	Targeted email (see appendix 1)
Actions:	Welcome email: <ul style="list-style-type: none"> - Sent from NHSmail

7.4.2 Email to staff whose migration has failed

Audience:	Failed migrations
Date:	<i>Insert</i>
Owner:	<i>Insert</i>
Comms channel:	Targeted email (see appendix 1)
Actions:	Email to staff whose migration has failed: What happens next

7.4.3 All staff email when migrations complete

Audience:	All staff
Date:	<i>When Migration complete</i>
Owner:	<i>Insert</i>
Comms channel:	All staff email
Actions:	All staff email when migrations complete: <ul style="list-style-type: none"> - Organisation now fully running NHSmail - Reiterate benefits

8. Appendices

Appendix 1: Key Messages

1.1 Phase 1

NHSmail is coming

Did you know that the organisation will be moving to a new email system [WHEN]? Some of you may already be using it but if you're not, NHSmail is a national email service which is secure for the transmission of patient identifiable data. It's available via the internet or internet enabled mobile phones that can be encrypted and gives you an email address that you keep for as long as you work in the NHS. Look out for more information about NHSmail over the next few weeks or contact [LOCAL CONTACT DETAILS].

Top three messages:

1. Secure

Email is encrypted whilst in transit, meaning NHSmail can be used to exchange clinical information securely with other NHSmail users and secure government domains.

2. Access anywhere

The service can be accessed from any internet-connected computer and some mobile devices, meaning you can pick up your emails from any location.

If you access the service over the internet there are two options:

- Default 'public' option that leaves no data on the computer - you can view but not download attachments.
- The 'private' option allows you to download attachments but you need to ensure the computer meets [ORGANISATION'S NAME] security policy [LINK TO LOCAL SECURITY POLICY].

3. Collaborative working

Integrated folder sharing and directory features means NHSmail can be used for workflow purposes within and across organisations. You can set up distribution lists, share folders and calendars and access the NHS Directory containing the contact details of over one million staff and NHS business partners.

When will the change happen?

We'll start to migrate staff over to the new email service in [DATE]. You'll be migrated by [HOW MIGRATIONS ARE ORGANISED] so it's easier to make sure calendars are synchronised, with the whole process taking about [HOW LONG].

1.2 Phase 2

What's happening and when (publish migration timeline if possible)

- Once migration has started, even if you haven't been migrated yet, you must monitor your NHSmal account as well as your existing [ORG NAME] account. This is because staff that have been migrated, when replying to a mail you have sent them, will find that their reply is directed to your new NHSmal account rather than your [ORG NAME] account.
- If you already use NHSmal or have an account that you haven't accessed for a while, re-familiarise yourself with your username and password and make sure you can access your account.
- Clean up your NHSmal mailbox if you have one and your existing email account – the contents of your [LOCAL ORG NAME] account will be added to the contents of your NHSmal account and if they add up to more than your NHSmal quota size your [LOCAL ORG NAME] account contents won't be migrated, and you may not be able to access them in the future.
- This is where to find help and guidance [LINK TO LOCAL GUIDANCE].
- More information can be found in a downloadable information pack – it's very important that you download and read it – access it here [LINK TO PACK].

Reiterate benefits for staff

- You can keep one email address for the duration of your NHS career even if you move between organisations.
- You can access the service from any internet connection i.e. log in from any NHS office or when off-site.
- NHSmal is a secure way to send patient identifiable information so you can be confident in maintaining data security.
- You can access the contact details of over one million NHS staff in the Directory.
- A 24/7 national helpdesk is available to all NHSmal users.

Benefits for the Trust

- It's centrally funded, free at the point of use for NHS organisations, saving money.
- It has built-in, cutting edge anti-spam and anti-virus software.
- It's not just email - NHSmal means collaborative working between and within NHS organisations through shared calendars, mailboxes and distribution lists.
- Skype for Business – Instant Messaging and Presence (free for all users).
- Skype for Business – full video conferencing suite (additional service).
- 4GB mailbox as standard – with the ability to increase to 25GB (at cost to the organisation).

Benefits for patients

- It's secure to use for exchanging patient data and other sensitive information between NHSmal users as well as secure government domains; e.g. *.gsi.gov.uk, *.gcsx.gov.uk, meaning patient records and information can be sent quickly and securely between healthcare providers, central and local government.
- The ability to send secure emails to patients via the NHSmal service.
- Secure patient consultations via video conferencing.

How will moving to NHSmal affect me?

- Your email address will change - it will end in @nhs.net - so you'll need to start telling people you regularly correspond with that your email will change.
- You'll have a new log in and password to access your email.
- You will need to understand the extra responsibilities you have in using NHSmal outside of the trust and on mobile devices.
- Certain attachment types are prohibited from sending to and from NHSmal accounts (mp3, avi etc). If you have any banned file types in your current email account, you'll need to copy to personal folders. For the full list see [LINK TO GUIDANCE].
- Opening other people's mailboxes and calendars is slightly different; they will need to give you permissions again.
- You may need some additional training; [NHSmal e-learning](#) is available, under the training section.

1.3 Phase 3

- Reminder of timeline for migrations.
- NHSmal is a secure national email service which enables the safe and secure exchange of sensitive and patient identifiable information within the NHS (to other NHSmal users) and with local / central government contacts using a secure email address. Before migration you must familiarise yourself with the NHSmal security guidelines as well as local policies to ensure that data is kept secure [LINK TO LOCAL GUIDANCE].
- [LINK TO DOWNLOAD INFORMATION PACK] containing key messages from all user communications phase 1 and headline messages from targeted comms i.e. reset your mobile device after migration.

1.4 Phase 4

Messages based around 'NHSmal is here' (see [appendix 2.3](#) welcome email.)

Appendix 2: Email Templates

2.1 Emails to over-quota users

Subject: Your [ORG NAME] account must be reduced in size

Dear []

As you should be aware [ORGANISATION NAME] is transferring its email service to the NHSmal email service from [DATE]. This means that the contents of your [ORGANISATION NAME] email account will be transferred your NHSmal account and your [ORG NAME] account will be closed.

Our records show that your [ORG NAME] mailbox is currently nearing / over quota (its allocated size limit). Please be aware that if you do not reduce your mailbox size before [DATE & TIME], the contents won't be moved to your NHSmal account and you may not be able to access them in the future.

Guidance on how to reduce your mailbox size can be found at: [LINK TO LOCAL GUIDANCE]. Please note that the contents of your calendar, contacts and tasks all count towards quota on NHSmal, so steps should also be taken to reduce them in size if they are large.

If you have recently taken measures to reduce your mailbox size, then apologies and please disregard this email.

Regards
[]

2.2 Migration reminder email template

Subject: Reminder – your email account is being transferred to NHSmal this weekend

Dear []

This is to remind you that your email account will be migrated to the NHSmal email service this weekend.

Please ensure that you have downloaded your migration information pack and have carried out any required actions. If you need a copy of the pack you can find it at: [LINK TO INFORMATION PACK].

Please note that:

- your mailbox must be well under quota by [DATE], in order for the content to be transferred to NHSmal. If it is not under quota, the content won't be migrated and you may lose access to it

- if you have an NHSmal account, this must also be under quota before the migration date. Your NHSmal calendar, contacts and tasks all count towards your quota so ensure that you reduce them in size as much as possible
- if you use a mobile device to access your account you must synchronise it before your migration
- if you have not yet logged into your new NHSmal account you must do so before your account is migrated otherwise you may not be able to gain access to it on Monday.

To log into NHSmal:

- Go to <https://portal.nhs.net>

If you are logging in from an NHS connection:

- Click on Login - enter your username and password.
- NHSmal works with all modern web browsers.
- Your session will timeout after eight hours of inactivity.

If you are logging in from a non-NHS connection:

- Click on Login - enter your username and password.
- Choose if you are using a “private” computer (the default option for this is “private” not being selected).
- If you choose “This is a private computer”, you will be prevented from downloading and saving email attachments and will only be able to view them in a web browser.
- Choosing “This is a private computer” means you are responsible for the security of any documents you download. Be aware that when you click on an attachment to open it, a copy will be saved to the 'temporary internet files' folder on the computer and therefore could be opened and read by someone else.
- A safer alternative is to right click the file, choose 'save as' and save it in a location of your choice before opening it.
- Tick the box if you are on a slow internet connection or require high contrast settings - you will use OWA Light.
- NHSmal works with all modern web browsers.
- Your session will timeout after 30 minutes of inactivity.

Guidance including how to set up an email program such as Outlook, or a mobile device to work with NHSmal can be found at: <https://portal.nhs.net/Help/policyandguidance>

If you have any questions, contact [LOCAL HELPDESK CONTACT DETAILS]

Best regards

[]

2.3 Welcome email

Dear [],

Welcome to the NHSmal service.

A quick overview of NHSmal

NHSmal uses Microsoft Outlook Web App (OWA) to allow you to manage your Email, Calendar and Contacts. When logged into your account click on this icon for access to OWA:



First...

Please read the information pack you were sent before your account was migrated and ensure you have completed the actions in the 'After migration' checklist. This will include things such as re-establishing any permissions on your account.

Helping you make the most of NHSmal

If you need help, there are lots of places to find it:

- [NHSmal Portal help pages](#) – packed with useful information about NHSmal, they contain mobile and email configuration guides, troubleshooting, case studies and much more.
- [NHSmal Portal User Guide – Guide for New Users](#) – a guide which provides a quick overview on how to use key Portal user features.
- [NHSmal Training Pages](#) – these training pages are designed to aid your learning experience whilst using the NHSmal service.
- The national NHSmal helpdesk is available 24 hours a day, seven days a week on 0333 200 1133, or you can email helpdesk@nhs.net.

Help within your organisation

Your Local Administrator (LA) can do things such as unlock your account or reset your password and help with other tasks such as amending directory records, setting up generic mailboxes and changing account details. Please note that passwords can be self-reset, and should be attempted before contacting your LA.

You don't need to be logged into your account to find your LA, as long as you are on an NHS connection:

- Go to <https://portal.nhs.net> and click on 'People Finder'.
- Search for yourself in the format of Surname, Firstname.

- Select your name, and then click your organisation name under “Organisation”. You will then be able to see a list of all the Local Administrators within your organisation.
- Please note that you will need to be on the HSCN / Transition Network connection to achieve this without logging into your account.

Logging in

You must, when using a non-NHS connection, indicate whether you are using a public / shared or private computer when you are logging into the Portal. Please be aware that if you choose ‘private’ you are fully responsible for the security of any documents you download. Choosing ‘public’ means you will be prevented from downloading or saving email attachments – this means that they can’t be left on a public computer for others to find.

Outlook & mobile users

Mobile; if you want to use a mobile device to access NHSmial you will need to set it up to access your account. For details on which mobile devices can be used with NHSmial and how to reset them, see the [Mobile Configuration Guide](#).

Outlook and other email programmes; to access NHSmial via an email programme you will need to change the settings and set up a new profile:

- Outlook 2007 and upwards - See the '[Desktop Configuration Guide](#)' for simple instructions on how to set up your new profile.

Please note that your organisation may be updating Outlook centrally. If this is the case, refer to communications from your organisation for details.

Quotas

Your mailbox is set to a maximum size of 4GB so if you exceed it you’ll be restricted on what you can do until you reduce your mailbox size e.g. you won’t be able to send, or in some cases, receive mail.

NHSmial is for exchanging information not for storing documents. Most of the space in mailboxes is taken up with attachments not emails, so these should be removed and stored in appropriate local storage.

Please ensure that your mailbox quota is managed at a regular interval, as NHSmial has a retention policy of 180 days meaning that all deleted emails are retained for 180 days. If this retention storage is full, and the 4GB main storage is full, this could lead to you being unable to send and receive email.

Guidance on managing your mailbox can be found [here](#).

We hope you enjoy using the new service.

Best wishes

The NHSmial Team