

# Guide for Social Care organisations using NHSmail

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Version 1

# Contents

<b>Introduction</b>	<b>3</b>
<b>Registering for NHSmail</b>	<b>3</b>
<b>How to log into your personal NHSmail account</b>	<b>4</b>
Password requirements	4
<b>How to send and receive emails</b>	<b>5</b>
<b>What is a shared mailbox?</b>	<b>5</b>
<b>How to access a shared mailbox</b>	<b>6</b>
<b>Shared mailbox owners and permissions</b>	<b>7</b>
Shared mailbox owner role	7
Shared mailbox permissions	8
<b>How to add an email signature</b>	<b>8</b>
<b>How to set an automatic reply (out of office)</b>	<b>9</b>
<b>What to do if your name changes</b>	<b>9</b>
<b>What to do if you are moving to another social care provider or leaving social care altogether</b>	<b>9</b>
<b>What to do if you are joining a social care provider and require an NHSmail account</b>	<b>10</b>
<b>Training and guidance materials</b>	<b>10</b>
Outlook Web App (OWA) – <a href="http://www.nhs.net">www.nhs.net</a>	10
Portal	10
<b>Help available to users</b>	<b>10</b>
<b>What to do if you forget your password</b>	<b>11</b>
<b>What to do if you are locked out of your account</b>	<b>11</b>
<b>How to use the NHS Directory to find people, social care providers and other NHS organisations</b>	<b>11</b>
<b>How to hide your mobile phone number from the NHS Directory</b>	<b>12</b>
<b>Service status and known issues</b>	<b>13</b>

## Introduction

NHSmail can be used by social care providers, to securely exchange patient or sensitive information with other health and social care organisations.

The purpose of this document is to provide social care providers with guidance on:

- how to register for an NHSmail account
- how to get started, using NHSmail
- what to do if you experience any issues with NHSmail.

More detailed step-by-step guidance about NHSmail is available at

<https://portal.nhs.net/Help/>.

## Registering for NHSmail

Information on how to register for NHSmail accounts can be found on the [joining NHSmail Portal help pages](#), within the section called 'Registering a Social Care organisation'.

Registration is for new users of NHSmail only. Social care providers with existing NHSmail accounts do not need to register for a new account. A process to transfer these accounts to the 'Care' container, so they can be administered centrally by the national administration service (NAS), will be launched in summer 2018.

- Once you have requested an NHSmail account, your application will be processed by the national administration service, who will send you your log-in details.
- A mobile phone number needs to be provided when applying for an NHSmail account, as temporary passwords are sent via a text message. It is important that this mobile phone number is unique to each user requested within the registration portal, as the number will also be used to check that an account for that user is not already in use. The phone number must be a mobile phone number and be personal to that user.
- Please note the mobile phone number provided as part of your NHSmail application is automatically added to your personal profile within the NHS Directory, but you can opt for this to not be visible.
- Please see the information on '[How to hide your mobile phone number from the NHS Directory](#)' for further guidance. Guidance is also available within the updating profile details section of the [Portal user guide](#).
- When you log-in to your account for the first time, you are asked to accept the acceptable use policy (AUP). At this stage, you will also be asked to set up security questions. You will need to be able to answer these questions if you are locked out of your account or have forgotten your password and need to complete a self-service password reset.
- If you require a password reset and are unable to answer your security questions (or have not set them up yet), the helpdesk will use your mobile phone number to authenticate you.
- It is not recommended that you remove your mobile phone number from the NHS Directory as this will be used by the helpdesk as part of the authentication checks to verify who you are. Please ensure your mobile phone number is kept up to date.

- In addition to your personal NHSmail account, you will also be given access to a shared mailbox. This is accessible by anyone in your organisation who is given permission by the shared mailbox owner.

## How to log into your personal NHSmail account

Once you have received your log-in details, go to [www.nhs.net](http://www.nhs.net) where you can access your email account and visit the Portal help pages for help and guidance.

- Go to [www.nhs.net](http://www.nhs.net).
- Click 'Login' at the top right hand corner of the screen.
- Enter your username (top box) and password (bottom box). Ensure you either select (if no-one else uses the computer) or de-select (if others use the computer) the option 'This is a private computer', to protect your mailbox data.

Sign in with your NHSmail account

Sign in

This is a private computer

Forgotten Password? [Click here.](#)

Note, if you de-select 'This is a private computer', you will not be able to download attachments and will only be able to view them as a web page.

When you log-in for the first time, you will be asked to change your password. Follow the on-screen instructions to do this,

## Password requirements

- Passwords 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 eight or more characters long.
- It cannot be any of your four previous passwords.
- Spaces or commas cannot be used.

You should choose a password that is memorable to you but not easily guessable.

Your password will then need to be changed at least every 90 days and you will receive several email reminders to do so, before your password expires.

You will need to ensure your account remains active by changing your password at least every 90 days, otherwise it may be de-activated or removed from the service.

Once you have changed your password you will need to log back into your account at [www.nhs.net](http://www.nhs.net). To access your email you will need to select the 'Email' tab from the homepage.

Further guidance is available in the section [self-service password management](#) of the Portal help pages.

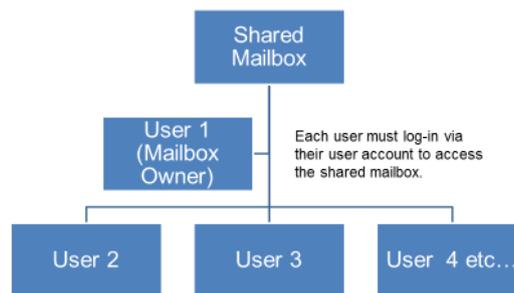
## How to send and receive emails

Users can send, receive and delete emails from their own mailbox and the social care organisation's shared mailbox.

Information on how to do this can be found in the quick reference guide [sending and receiving emails](#).

## What is a shared mailbox?

All social care organisations will be set up with a shared mailbox. This mailbox is separate to your personal mailbox and is used by multiple members of staff. Staff gain access to the shared mailbox via their personal mailboxes, which are linked to the shared mailbox during set-up or by the shared mailbox owner locally. Users with access to the shared mailbox can send emails 'on behalf' of the mailbox.



2

The naming format of the shared mailbox is [care.postcodetown.carehomenameODScode@nhs.net](#) (organisation display name).

**Note:** 'care' is the shortname used as a pre-fix to all shared mailboxes and distribution lists (DLs). This allows mailboxes and DLs to be easily searchable in the NHS Directory and identifiable as belonging to a social care organisation.

The mailbox will belong to a container which will be named after the social care organisation, for example, Bumbleton Care Home. All mailboxes within that organisation, both the shared mailbox and the user accounts, will sit within that container in the NHS Directory.

The display name in the NHS Directory will include the container name, for example, [care.postcodetown.carehomenameODScode@nhs.net](#) (BUMBLETON CARE HOME). User mailboxes will also belong to the provider's container and this will appear in the display name in the NHS Directory, for example, john.smith@nhs.net (BUMBLETON CARE HOME).

Shared mailboxes will have the following format for easy identification:  
[care.newcastle.bumbletoncarehomev12345@nhs.net](#) (Bumbleton Care Home)

Term	Owning organisation	Postcode town	Social care provider name	ODS code	Organisation display name	Shortname
<b>Description</b>	Container where all social care providers' accounts sit within	The postcode town where the provider is located	Social care provider name	Organisation code	Name of the container where all social care providers' accounts sit	The shortname is the pre-fix to all shared mailboxes which makes them easily searchable and identifiable
<b>Example shared mailbox address</b>	Bumbleton Care Home	Newcastle	Bumbleton Care Home	V12345	Bumbleton Care Home	care

It is recommended that the shared mailbox is accessed on a regular basis, to ensure that all clinical referrals and urgent communications are received and processed in an appropriate and timely manner.

All shared mailboxes must have a nominated owner who is accountable for the mailbox and has the ability to delegate access to others. You need to be added to the group of users for any shared mailbox before you can access and use it.

If you require access to your shared mailbox please contact the shared mailbox owner. Further information on this role can be found in the section '[Shared mailbox owners and permissions](#)'.

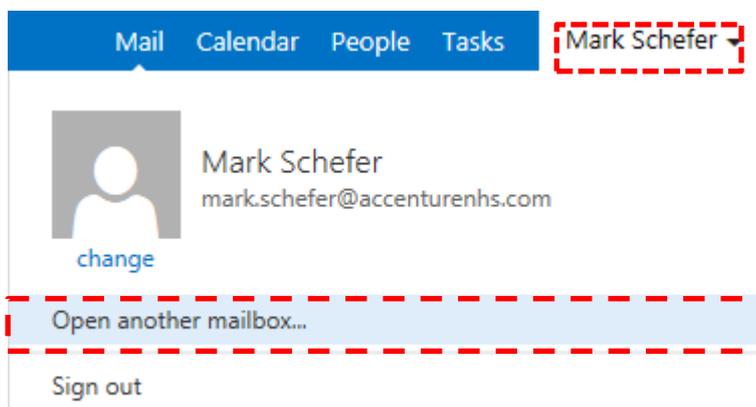
Further information on how to use the NHS Directory can be found in the section [how to use the NHS Directory to find people, social care providers and other NHS organisations](#).

## How to access a shared mailbox

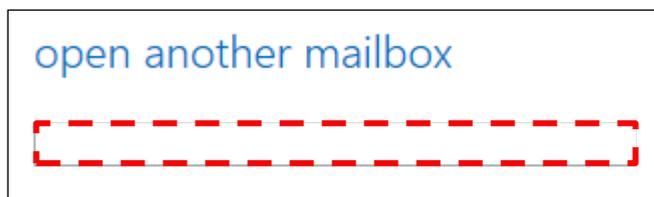
You can access a shared mailbox over the internet through Outlook Web App (OWA) at [www.nhs.net](http://www.nhs.net). Please note that you cannot access a shared mailbox from a mobile device.

When you open a shared mailbox, it will appear in a new tab in your internet browser, meaning you will be able to access your own mailbox at the same time.

1. Log into your personal NHSmail address at [www.nhs.net](http://www.nhs.net), click **your name** at the top right of the screen and select '**Open another mailbox....**'.



2. Type the **name** of the mailbox you want to view in the **search bar**.



You may need to search the NHS Directory if the shared mailbox details do not automatically appear in the search window. Further information on how to use the NHS Directory can be found in the section '[How to use the NHS Directory to find people, social care providers and other NHS organisations](#)'.

3. Select the correct mailbox and click **open** and the mailbox will open in another tab on your internet browser.

When the mailbox opens (in another tab in your internet browser), the original tab with your mailbox open will also stay open. When you sign out of your own mailbox, you will automatically be signed out of any shared mailboxes as well.

A quick reference guide with further information on [delegate and shared mailboxes](#) is available.

## Shared mailbox owners and permissions

### Shared mailbox owner role

Each social care provider will have a nominated shared mailbox owner. The shared mailbox owner is responsible for controlling the access to the shared mailbox for the organisation.

- NHSmail users can be a shared mailbox owner for more than one shared mailbox.
- Shared mailboxes can have more than one owner, where this is required for business continuity purposes.

Shared mailbox owners are also responsible for:

- contacting the national administration service to arrange for new users within their organisation to be set up with NHSmail accounts
- cascading log-in credentials for new NHSmail users within their organisation
- supporting new users to log-in to their account for the first time
- providing access permissions to the shared mailbox for all staff within their organisation
- ensuring that all staff adhere to the [Information Governance Toolkit guidance](#) (free staff information governance training is available on the [Health Education England e-learning service](#))
- removing access permissions to a shared mailbox for staff that have left the organisation.

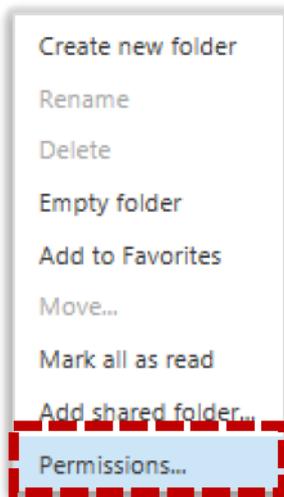
Shared mailbox owners must ensure they do not remove their mobile number, given at the time of registering their NHSmail account, from the NHS Directory and ensure it is kept up to date. They are the primary point of contact for the national administration service to liaise with if another user in their organisation forgets their password, is unable to answer their security questions or does not have a mobile phone number that can be used as part of the authentication process.

## Shared mailbox permissions

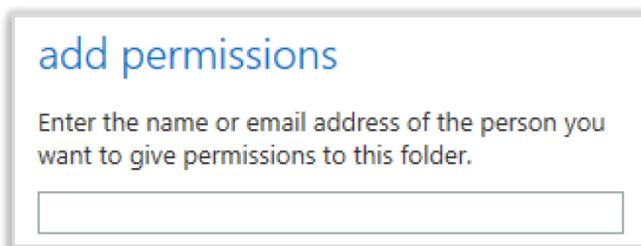
All users who have access to the provider's shared mailbox will have 'send as' permission, allowing them to open the shared mailbox, view incoming emails and send emails from the shared mailbox email address. The email message will appear to have been sent from the shared mailbox and will have no affiliation to the user's personal email address.

The shared mailbox owner will have additional access rights to control all user permissions within the mailbox and add and remove users.

The shared mailbox owner can add and remove users by right clicking on the shared mailbox on the left hand side of the screen and selecting '**Permissions**' from the drop down list.



The person's name should be entered in the search field before clicking add, to give the person delegate access to the mailbox.



Further information on shared mailboxes permissions can be found in the [delegated and shared mailboxes](#) quick reference guide.

## How to add an email signature

An email signature is a way of providing your contact details when you send an email, such as your name, job title, organisation and phone number.

Providers may wish to standardise this for both individual mailboxes and the shared mailboxes.

Before adding an email signature, providers should contact their head office as they may have specific requirements or a standard template which should be used.

Information on how to do this can be found in the [advanced email use](#) quick reference guide.

## How to set an automatic reply (out of office)

Before setting automatic replies, social care providers should contact their head office as they may have specific requirements or a standard template which should be used.

An automatic reply (out of office message) is an automatic response, that is sent to the sender when you receive an email and should be set when you will not be accessing your emails for a period of time. It will commonly include details of when you will be returning and who to contact in your absence. The response can be added to both the individual mailboxes and the organisation's shared mailbox, however only the shared mailbox owner will be able to add the response to the shared mailbox.

Information on how to set an automatic response can be found in the [advanced email use](#) quick reference guide.

## What to do if your name changes

If your name changes, for example, you get married and change your surname, you should contact the national administration service for social care by emailing [careadmin@nhs.net](mailto:careadmin@nhs.net), who will edit your name and update your email address. Your old email address will be retired but will remain associated with your new account. If another user sends an email to your old email address it will be re-directed to your new email address indefinitely.

## What to do if you are moving to another social care provider or leaving social care altogether

If you are leaving your organisation you will need to notify the national administration service for social care providers by emailing [careadmin@nhs.net](mailto:careadmin@nhs.net), who will mark your NHSmail account as a 'leaver'. If you are moving to another social care provider you will also need to inform the national administration service so they can mark you as a 'joiner' to your new organisation.

If you are leaving the social care profession and no longer require an NHSmail account, your account will be permanently deleted 30 days after being marked as a 'leaver'. You should ensure any data relating to your role is saved locally as once the mailbox has been deleted, any data contained within it can no longer be retrieved.

If you are a shared mailbox owner, you will need to ensure a new owner is identified and the national helpdesk are informed.

**Note:** NHSmail accounts that are marked as 'leavers' are permanently deleted after 30 days, if no new organisation is identified. Additionally, NHSmail accounts that are not utilised for 90 days are de-activated and will be permanently deleted after a further 90 days.

Further information can be found within the [leavers and joiners guide](#).

## What to do if you are joining a social care provider and require an NHSmail account

If you do not have an NHSmail account you will need to inform the shared mailbox owner for your new provider, this is likely to be the organisation's manager or administrator. You will need to provide them with your personal mobile phone number, as your password will be sent to you via a text message. For further information on the use of mobile phone numbers see [registering for NHSmail](#).

The shared mailbox owner will then need to email the national helpdesk at [careadmin@nhs.net](mailto:careadmin@nhs.net), asking for your account to be created.

## Training and guidance materials

Training and guidance materials are available at <https://portal.nhs.net/Help/> and these cover all aspects of the NHSmail service including:

### Outlook Web App (OWA) – [www.nhs.net](http://www.nhs.net)

<https://portal.nhs.net/Help/owaindex>

- Email
- Calendars
- People (contacts)
- Tasks and reminders

### Portal

<https://portal.nhs.net/Help/portalindex>

- NHS Directory
- Managing your password
- Managing your personal profile
- NHSmail Portal help pages
  - [Policy and guidance documents](#) – you should familiarise yourself with the content of these
  - [Service status page](#) – this provides details of any service issues and should be the first place you check if you are experiencing problems with your NHSmail accounts

## Help available to users

NHS social care email users that have joined NHSmail by the registration portal, can contact the national administration service for email support via [careadmin@nhs.net](mailto:careadmin@nhs.net) or by calling 0333 200 1133.

If your NHSmail account is hosted by a local organisation (CCG / CSU), please contact your IT helpdesk for local administration support.

All NHSmail users can also contact the national helpdesk via [helpdesk@nhs.net](mailto:helpdesk@nhs.net) or call 0333 200 1133. The NHSmail service provides a national helpdesk 24 hours a day, 365 days a year.

## What to do if you forget your password

If you have forgotten your password, you can reset it using the self-service password reset function via [self-service password management](#).

If you are unable to reset your password, you can contact the social care provider national administration service for support, by emailing [careadmin@nhs.net](mailto:careadmin@nhs.net) or alternatively calling 0333 200 1133.

If you are unable to answer your security questions, the helpdesk will use your mobile phone number to authenticate you. If you do not have a mobile phone number on the directory, you will need to speak to the shared mailbox owner of your organisation account.

The shared mailbox owner will need to contact the helpdesk to confirm they can authenticate you and ask them to reset your password. The national helpdesk will ask the shared mailbox owner to confirm the mobile phone number, for the temporary password to be sent to. It is the responsibility of the shared mailbox owner to ensure local validation checks on individuals have been completed.

Further information on password resets can be found in the [Portal user guide](#). The guidance also includes instructions on how to set security questions and answers.

## What to do if you are locked out of your account

If your account was created online, using the online registration tool or via a bulk upload, you can contact the national administration service (NAS) for support by emailing [careadmin@nhs.net](mailto:careadmin@nhs.net) or alternatively calling 0333 200 1133.

If you are unable to answer your security questions, the helpdesk will use your mobile phone number to authenticate you. If you do not have a mobile phone number on the directory, you will need to speak to the shared mailbox owner of your provider's account.

The shared mailbox owner will need to contact the helpdesk to confirm they can authenticate you and ask them to reset your password. The national helpdesk will ask the shared mailbox owner to confirm the mobile phone number, for the temporary password to be sent to. It is the responsibility of the shared mailbox owner to ensure local validation checks on individuals have been completed.

If your NHSmail account is hosted by a local organisation (CCG / CSU), please contact your IT helpdesk for local administration support.

## How to use the NHS Directory to find people, social care providers and other NHS organisations

You can use the NHS Directory to search for other NHSmail users and can save these contacts in your contact list.

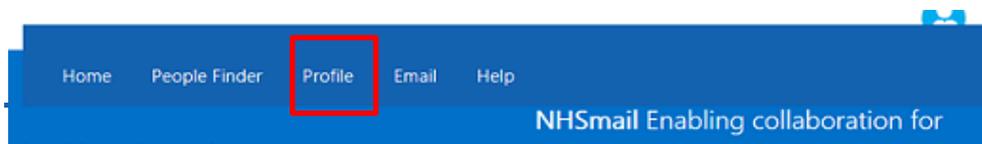
Guidance on how to use the NHS Directory can be found in the [managing contacts](#) quick reference guide.

## How to hide your mobile phone number from the NHS Directory

A mobile phone number needs to be provided when applying for an NHSmail account, as temporary passwords are sent via a text message. The mobile phone number provided during registration is automatically added to the NHS Directory but you can opt for this to not be visible.

To do this you will need to follow the below steps:

1. Log into your account via [www.nhs.net](http://www.nhs.net).
2. Click '**Profile**' in the navigation bar at the top of the screen.



3. Click on '**My Profile**' tab (if it isn't already selected).
4. 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.

This information is displayed in the directory to other users of the email system

ANDERSON, Pat (LEEDS TEACHING HOSPITAL)

Telephone

Mobile

Hide mobile number from address book

Fax

Pager

Web Page

Profile

5. Please ensure your mobile phone number is keep up to date, as this may still be required for authentication purposes should you forget your password.

Guidance on how to hide your mobile phone number and update your personal details is available within the updating profile details section of the [Portal user guide](#).

It is not recommended that you remove your mobile phone number, as this will be used by the helpdesk as part of the authentication checks.

## Service status and known issues

Up to date information on the status of the NHSmail service and any known key issues impacting users can be found on the Portal help pages at <https://portal.nhs.net/Help/servicestatus>.