



NHSmail – Leavers and Joiners Management

User and Local Administrator Guidance

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Contents

Overview.....	4
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How does the leaver / joiner process work on the NHSmail service?.....	4
What to do with an NHSmail account when a user leaves their owning organisation.....	5
Marking the account as a ‘leaver’ to be deleted.....	5
Marking the account as a ‘leaver’ to then be joined to a new organisation as a ‘joiner’.....	7
Appendix1.....	11

Overview

This document outlines the actions that users and Local Administrators should take in relation to NHSmal accounts when a user joins and / or leaves an organisation.

Organisations administered by the National Administration Service (NAS) should contact the Helpdesk as outlined in [Appendix 1](#).

How does the leaver / joiner process work on the NHSmal service?

All accounts on the NHSmal service are assigned to an owning organisation and follow the account management lifecycle as detailed in the [Data Retention and Information Management Policy – NHSmal Support](#). Account management is a daily responsibility of the NHSmal Local Administrator.

When a user leaves the owning organisation, their NHSmal account should be marked as a 'leaver' by their Local Administrator. The account remains in the leaver status on the system for 30 days after which the account and the data within it will be eligible for deletion. The data within the account is retained and recoverable in line with the [data retention policies](#).

User(s) can request their account to be marked as a leaver from their current organisation, or as a joiner to a new organisation due to joining another organisation, career redirection, organisation restructuring or organisation getting closed. The instructions on how to do so can be found on [Request for Leaver and Joiner – NHSmal Support](#)

The Online Archive mailbox associated with the account will also be deleted along with its data. After a further 30 days of being in a deleted state, the account and the associated Online Archive mailbox cannot be restored.

During this period of 30 days, the user's account can be 'joined' to a new owning organisation if they are moving employment to another organisation that uses NHSmal. This allows the user to retain their @nhs.net email address when moving from one role to another.

The Online Archive mailbox associated with the account and emails within it will continue to be accessible to the mailbox owner when an account is moved between organisations.

What to do with an NHSmal account when a user leaves their owning organisation

If a user is leaving their owning organisation there are two options:

1. Mark the account as a 'leaver' so that the account will follow the account management lifecycle process and be deleted.
2. Mark the account as a 'leaver' so that it can be joined to a new organisation.

Note: If you have PLA / LA rights for both the closed organisation and the new organisation, you can use the 'transfer' function as an alternative to the 'leaver / joiner' process.

Further guidance on carrying out leaver / joiner activities is available via [leaver/joiner process](#).

Marking the account as a 'leaver' to be deleted

If the user is leaving the owning organisation and moving to an organisation that does not use NHSmal, their NHSmal account must be marked as a 'leaver' and after 30 days will be eligible for deletion from the service. Any Local Administrator permissions will be automatically removed from the account once it is marked as a 'leaver'.

Note: If the user should not be using the account within the 30-day period, then the Local Administrator is able to change the password, remove the mobile number and add a note to the account before marking it as a 'leaver'.

The mailbox owner should remove any personal emails they wish to keep and work with the Local Administrator to ensure the below tasks take place.

NHSmial – Leavers and Joiners Management

- An 'out of office' message should be added on the mailbox stating the user is leaving their role and asking senders to re-send data to the replacement mailbox. This can be added by the user or the Local Administrator
- Ensure that role-related information is passed on as appropriate as the NHSmial service will not retain any of the account data once the account has been permanently deleted. Archiving data from accounts, prior to marking the account as a leaver, should align to your local organisation policies

Ensure the email address is removed from:

- organisation-wide distribution lists
- local distribution lists
- access to any shared mailboxes
- access to any delegated user mailboxes
- Microsoft Teams sites
- SharePoint groups
- other O365 Groups
- access to organisation specific PowerApps environments

Consider moving the account to a basic user policy to disassociate any enhanced M365 licences from the account should that be the case.

This will ensure that the user will no longer receive communications related to any distribution lists / mailboxes during the 30-day period following the account being marked as a 'leaver'.

Note: If your organisation is connector managed (e.g. making use of [TANSync](#)), as a Local Administrator you should be mindful that any manual edits made using this process may be overwritten by the connector if the connector is not also updated with this new information.

Marking the account as a ‘leaver’ to then be joined to a new organisation as a ‘joiner’

If a user is leaving one organisation and joining another one that uses NHSmial, they should move their NHSmial account between the organisations.

Note: Users are expected to only utilise one NHSmial email account. Should a user require multiple accounts, this would be a local organisation decision dependant on each use case as outlined the [Acceptable Use Policy](#). The Local Administrator should always establish whether the user has an existing account before creating a new one.

Whilst moving between the organisations, providing the password is active, the account and the associated Online Archive mailbox will remain accessible to the user throughout, ensuring continuity of service.

The mailbox owner should work with their current Local Administrator to ensure the below tasks take place.

- Mark the account as a ‘leaver’. Any Local Administrator permissions will be automatically removed from the account once it is marked as a ‘leaver’
- In the run up to leaving the organisation, the user / LA should put an ‘out of office’ message on the mailbox stating they are leaving their role on a given date and advising senders of where all further communications should be sent after that date
- Remove any data relating to their current role before moving to their new role in the new organisation, to:
- Prevent data belonging to one organisation being accessible by the user once they are employed by someone else and to also provide future access for authorised staff in the existing organisation. Exporting data from accounts, prior to marking the account as a leaver, should align to your local organisation policies.

- Ensure their mailbox consumed storage aligns with the nationally provisioned limits (50GB for NHSmial Enhanced User organisations and 4GB for NHSmial Standard Service organisations). Please note, if a user is being moved from a NHSmial Enhanced Service organisation to a NHSmial Standard Service organisation, their mailbox must be reduced in size if they are consuming more than 4GB. A user can check their total mailbox storage, along with the amount they have consumed through their Exchange Online Mailbox. On the Outlook Web App, select Settings > General > Storage. [The Exchange Online archive option](#) can be utilised to manage down the size of a mailbox, whilst retaining all files, before marking an account as a leaver.
- Ensure that OneDrive storage allocation has been considered if a user is moving from an NHSmial Enhanced Service organisation to a Standard Service organisation. To ensure a user can continue to effectively utilise their OneDrive when moving from an Enhanced Service organisation to a Standard Service Organisation, the user must have less than 2GB of consumed OneDrive storage, otherwise, they should be moved into a user policy with a local licence that assigns a larger OneDrive allocation. A user can check their OneDrive storage via their Exchange Online Mailbox. On the Outlook Web App, select Apps > OneDrive. Total storage available and consumed will be viewable.
- If the user's OneDrive is over 2GB and there is no option for them to be moved into a user policy with a larger OneDrive allocation, then they must raise a request to the Helpdesk to enable them to manage down their storage themselves. The helpdesk will temporarily take the user out of the 180-day OneDrive retention policy to enable them to delete files both from their OneDrive but also their Recycle Bin. Please note, just deleting files without emptying the Recycle Bin does not create additional storage, a Service Request is therefore necessary as when in the retention policy the user cannot empty the Recycle bin. Therefore, the user must be temporarily moved out of the retention policy by the Help Desk to enable them to take action.

NHSmial – Leavers and Joiners Management

- Ensure the email address is removed from:
 - organisation-wide distribution lists
 - local distribution lists
 - access to any shared mailboxes
 - access to any delegated user mailboxes
 - Microsoft Teams sites
 - SharePoint groups
 - other O365 Groups
 - access to organisation specific Power Apps environments

This will ensure that the user will no longer receive communications related to any distribution lists / mailboxes during the 30-day period following the account being marked as a 'leaver'.

- Consider moving the account to a basic user policy to disassociate any enhanced M365 licences from the account should that be the case
- Consider whether the user's one drive data should be deleted or retained. If retained, the data will be accessible to the user should their account be licensed for the NHSmial Office 365 Service at their new organisation

Note: if your organisation is connector managed (e.g., making use of [TANSync](#)), Local Administrators should be mindful that any manual edits made using this process may be overwritten by the connector if the connector is not also updated with this new information.

The mailbox owner should work with their new Local Administrator to:

- request they mark them as a 'joiner' in the new organisation at the appropriate time – this must be done within 30 days of being marked as a 'leaver' otherwise the account

NHSmial – Leavers and Joiners Management

will be eligible for deletion. The user's organisation display name will change from the old owning organisation to the new one

- change their 'out of office' message once they have moved organisations to clearly state they are no longer carrying out their old role and provide an alternative email address advising where to re-direct the email and all further communications

Note: If you are not sure who the Local Administrator for your new organisation is, [guidance](#) is available on how to find them.

Appendix 1

Dedicated support is available for organisations administered by the National Administration Service (NAS) via the Helpdesk:

Email: Helpdesk@nhs.net

Telephone: 0333 200 1133

Please visit also [Frequently Asked Questions \(FAQs\)](#) which apply to community pharmacy, dentistry, social care organisations, optometry and Dispensing Appliance Contractors (DACs) users in England who are managed by the National Administration Service (NAS).