

Fresh Service Self-Service Portal for NHS Lothian Microsoft 365 Email

Guidance for Community Contractors – Logging Calls

The NHS Lothian Service Desk has implemented the functionality for contractors to log calls on the self-service portal rather than by telephone. This guide is to explain how to access this and log calls.

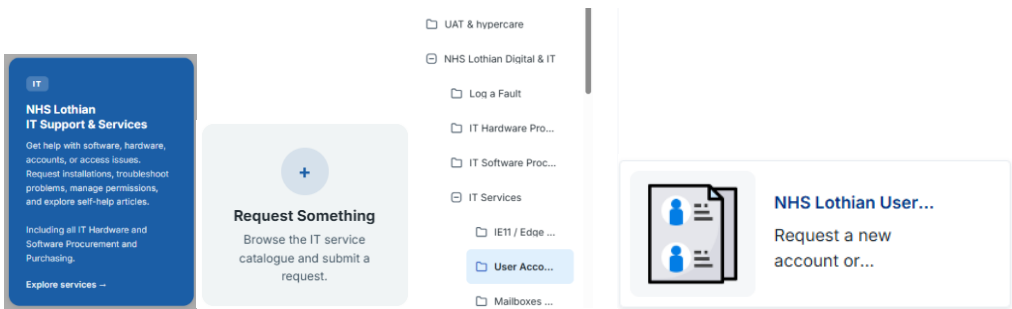
BEFORE YOU GET STARTED...

Before you begin logging a call on Fresh Service, please make sure you are set up to access Fresh Service in NHS Lothian. The portal is accessible at: <https://nhslothian.freshservice.com/support/home>



Contractor NHS Scot
eMail Application Form

You will need to attach the signed Contractor NHS Scot eMail Application Form or User ID request form to any account setup/change request you are going to make via Fresh Service for email/SCI Gateway Requests (except for password resets), and this is also included at the end of this document. Click through ‘IT Support & Services’ > ‘Request Something> ‘User accounts and passwords’ > ‘NHS Lothian User Account Request’



NHS Lothian Email Accounts	
Type of request?	Who needs to log request?
Email set up for new user	User’s manager or senior staff member with existing nhs.scot account
Email Account Locked	User to log in with current nhs.scot account
Email Account deactivation for staff leaving	User or user’s manager
Email Password reset for user	User to log in with current nhs.scot account
Linking Email Account to an additional mailbox	User’s manager or senior staff member with existing nhs.scot account

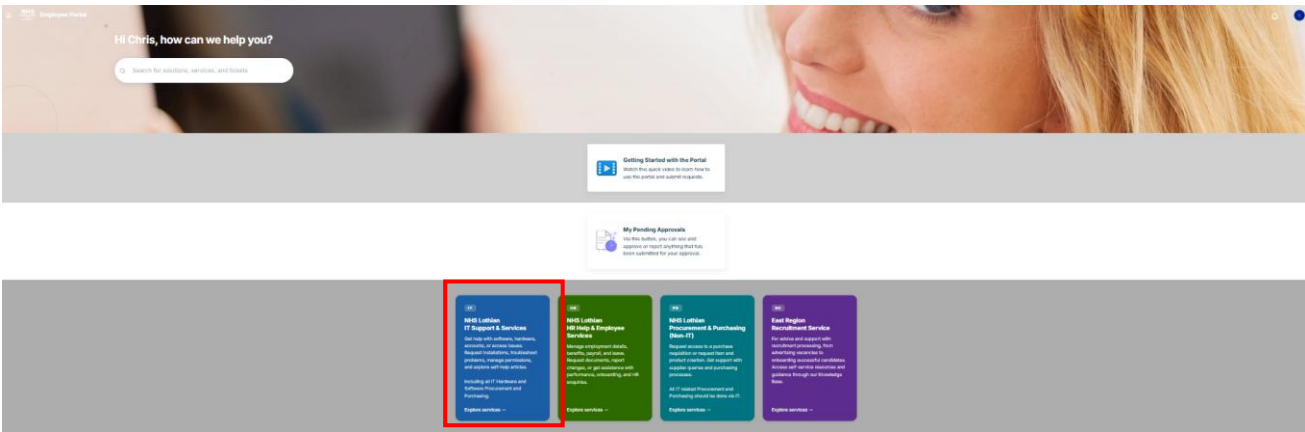
HOW TO LOG A CALL

- 1.Open up your computer’s browser (ideally Google Chrome or Microsoft Edge), and go to:
<https://nhslothian.freshservice.com/support/home>
- 2.Log in using the option ‘Sign in with your regular NHS Account’ using your NHS email address and password.

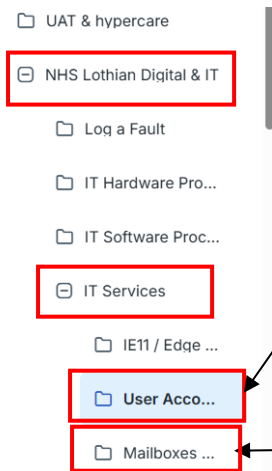
If you don’t have an **nhs.scot** account yet but wish to apply for one, you need to ask your manager or other senior permanent member of staff to log a request on your behalf. If there is no one you can ask, the completed form should be sent to the relevant Community Contracts Team who will forward it on to us.

Email: loth.dentalcontract@nhs.scot, loth.opthalmiccontract@nhs.scot or loth.communitypharmacycontract@nhs.scot

- 3.The ‘IT Support & Services’ on the main Fresh Service menu is the option you will usually use, so click this, then click either ‘Report and issue’, or ‘Request Something’:



- 4. On the next screen, click on ‘+’ next to the ‘NHS Lothian Digital & IT’, then ‘IT Services’ options to expand them. Then select ‘User Accounts’ or ‘Mailboxes’:



Choose this option for tickets relating to:

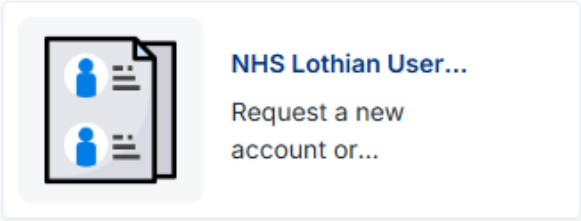
- New Outlook account creation/reactivation/deletion (NHS Lothian User Account Request)
- Password resets
- MFA reset

Choose this option for tickets relating to:

- Linking to/unlinking from to a Practice/Premises shared mailbox (Generic Mailbox – User Access / Removal Request)

NEW OUTLOOK ACCOUNTS FOR NEW STAFF, ACCOUNT UNLOCKING, ACCOUNT DEACTIVATION FOR STAFF LEAVERS

After clicking ‘User Accounts & Passwords’ in the steps above, you should then click this tile:



The user’s line manager (or Practice owner/other senior permanent staff member) needs to request a new email account for them. They should fill out the form as follows:

FIELD:	YOUR INPUT:
Caller/Requestor Details	(This should be prefilled with your nhs.scot address)
Contact Number	Practice/Premises landline and personal mobile
Location	If a non NHS location, select No, then select Not Listed and manually type the site details if the practice isnt listed.. Otherwise, click arrow button and select your Practice/Premises location from the drop down. Begin typing in the search box and the options are filtered.
Type of request	Click relevant radio button: - New Account (New to NHS Lothian) – New Staff Member who has not worked within any NHS Board area - New Account (Transferring from another board) – New Staff Member who has an existing account within another NHS Board area - New Account (Working for multiple boards) – New Staff Member who works across 2 or more NHS Boards - Account Amendment (Additional System Access) – Staff Member needs additional system access such as SCI Gateway, OR requires changes made to their Name, location etc. - Account Reactivation – Staff Member no longer has access to their account or is returning after an extended period of absence - Account Removal – Staff Member has left employment.
Is the user an NHS Lothian employee	This will be the user’s employment status going forward. They will either be a full NHS contract or will be non-NHS staff who require access to the system, i.e. employees of a private practice. For non-NHS/practice employees, select No and manually type the employer name.
Questions regarding employee and employer	Answer as appropriate, e.g. Not working from an NHS site then the practice site can be input manually.
Will this user require an NHS Scotland email address	Select Yes if an NHS email address is required, or select No and input their existing NHS email address
NHS Lothian manager or authoriser name	Practice manager can be selected as the authoriser name, alternatively select ‘not listed’
Forename, Surname	This will form the username and email (firstname.lastname@nhs.scot) Middle name(s) (If applicable) – This will only be used to differentiate between users of the same name.
Department	Select ‘ Not listed ’ if not an NHS employee. Alternatively select the users main NHS Lothian department from the dropdown menu, any physical correspondence will be posted there.

Site	Select ‘Not listed’ if not an NHS employee. Alternatively select the user’s main site from the list, any physical correspondence will be posted there.
Job title	The users job title, will be displayed on outlook if applicable.
Contact number	The users work phone number, will be displayed on outlook if applicable.
User agreement	Once ticked to confirm agreement, options will appear where the relevant systems access can be selected, with an additional comments box below for free text if needed.
 Attach files	Click the Attach files button and add a photo/scan of the user’s Contractor NHS Scot eMail Application Form / User ID request form which you need to save first on your Practice/Premises computer.

Click ‘Place Request’ button on the right hand side, and take a note of the call reference number when it appears – this will start with either SR or INC. You will need this if you need to contact eHealth.

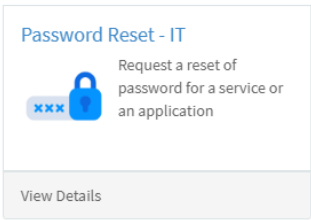
Log out by clicking on your initials in the top right hand corner, and selecting ‘Logout’.

You will be emailed progress updates on your Fresh Service request. Users new email logon details will be emailed to the line manager listed on the request.

When users first log into their new Outlook accounts, they will be asked to set up an authentication method. We recommend users avoid downloading the Authenticator App, and instead select ‘I want to choose a different method’ and opt to get a six digit code texted to their mobile instead. Note: for Data Protection and Information Governance reasons, managers should request Outlook accounts to be deleted and/or unlinked from the locations shared mailbox as soon as possible for any staff leavers. This can be done via raising a call via Fresh Service or via the eHealth Helpdesk on 0131 536 5050.

PASSWORD RESET

After clicking ‘User Accounts & Passwords’ in Step 5 above, you should then click on this button:



Now the user needs to fill out the form as follows:

FIELD:	YOUR INPUT:
Caller/Requestor Details	(This should be prefilled with your nhs.scot address)
Contact Number	Practice/Premises landline and personal mobile (your new password will be texted)
Location	For non NHS employees, select Not Listed and manually type the site. Otherwise click arrow button and select your Practice/Premises location from the drop down. Begin typing in the search box and the options are filtered.
Form Details	
Application	Click arrow and choose ‘NHS.Scot’ from the drop down menu
What is your username	Enter your full email address e.g. charlie.chocolate@nhs.scot
When was the last time this application was accessed	Enter rough date. Note that if an account is not used in the last 6 weeks, it starts to slide towards inactivity; after 2 months of inactivity, it is earmarked for deletion by IT housekeeping software.

Click ‘Place Request’ button on the right hand side, and take a note of the call reference number when it appears – this will start with either SR or INC. You will need this if you need to contact eHealth.

Log out by clicking on your initials in the top right hand corner, and selecting ‘Logout’.

You will be emailed progress updates on your Fresh Service request.

To **change your given password** to something easier to remember, log in to your account first then click your initials on the top right-hand corner, 'View Account' and click password on left hand side of screen. Enter your current password, then choose a new password.

Password complexity requirements – must meet the following:

NHS Lothian network passwords must consist of 14 or more characters and contain 3 of the following 4 requirements:

- English uppercase characters (A...Z)
- English lowercase characters (a...z)
- Base 10 digits (0...9)
- Special character e.g. exclamation point [!], dollar sign [\$], pound sign [#], percent sign [%], asterisk [*], etc

A special character is a character that is not an alphabetic or numeric character. Punctuation marks and other symbols are examples of special characters. Your new password will also need to be different from any of the previous 18 passwords you've used.

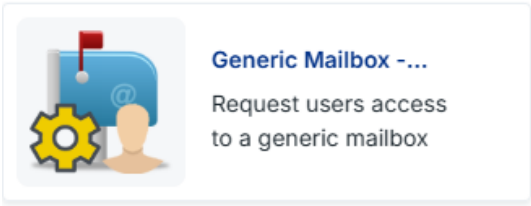
A simple way is to use 3 random words that mean something, e.g. sister's name, pet breed, favourite food. Start with a capital, add a number at the end and then a '!' or '?' or similar... For example: Fionacollielhaggis8!

LINKING TO/UNLINKING FROM A PRACTICE/PREMISES SHARED MAILBOX

Note: for Data Protection and Information Governance reasons, managers should request Outlook accounts to be deleted and/or unlinked from the Practice/Premises shared mailbox as soon as possible for any staff leavers. This can be done via raising a call via Fresh Service or via the eHealth Helpdesk on 0131 536 5050.

The user’s line manager (or Practice owner/other senior permanent staff member) needs to request the linking of the user’s account to the Practice/Premises shared mailbox. (Practice owners/managers can fill out for themselves.) The form should be filled out as follows:

After clicking the ‘Mailboxes & Shared Drives’ option in the previous steps above, click on this button:



Fill out the form as follows:

FIELD:	YOUR INPUT:
Caller/Requestor Details	(This should be prefilled with your nhs.scot address)
Contact Number	Practice/Premises landline and personal mobile
Location	For non NHS employees, select Not Listed and manually type the site details. Otherwise click arrow button and select your Practice/Premises location from the drop down. Begin typing in the search box and the options are filtered.
Job title	Your job title
Department/Speciality	Enter Community Dental/Optometry/Care Home contractor As req’d
Request type	Select appropriate option for adding a user or removing a user
Mailbox name/email address	Full email address of your Practice/Premises shared mailbox usually in format Dental.practicename@nhs.scot or Optom.practicename@nhs.scot etc.
Users that require access	Email address(es) of user(s) e.g. charlie.chocolate@nhs.scot
Users that require send permissions	Email address(es) of user(s) e.g. charlie.chocolate@nhs.scot
Attach files	Click the paperclip and add a photo/scan of the user’s signed Contractor NHS Scot eMail Application Form which you need to save first on your Practice/Premises computer

Click ‘Place Request’ button on the right hand side, and take a note of the call reference number when it appears – this will start with either SR or INC. You will need this if you need to contact eHealth.

Log out by clicking on your initials in the top right hand corner, and selecting ‘Logout’.

You will be emailed progress updates on your Fresh Service request.

NOTE: Linking/unlinking requests may take a few days at least to be actioned, so this option is not suitable for Locums/Reliefs working in your practice/pharmacy for just a day!

TECHNICAL ISSUES

If something is not working properly with your Outlook account or practice/pharmacy’s shared mailbox, you can log a call to get this investigated by eHealth:

Log into Fresh Service portal as in the steps the start of this guide, then on the left hand menu, expand ‘NHS Lothian Digital & IT’ and click ‘Log a Fault’. The IT – Hardware / Software ticket is in here.



FIELD:	YOUR INPUT:
Caller/Requestor Details	(This should be prefilled with your nhs.scot address)
Contact Number	Practice/Premises landline and personal mobile
Location	For non NHS employees, select Not Listed and manually type the site details. Otherwise click arrow button and select your Practice/Premises location from the drop down. Begin typing in the search box and the options are filtered.
Issue type	Click arrow button and select ‘software’
Application name	Outlook email
Short description	Short summary of problem e.g. ‘can’t email out from shared mailbox’ (max 32 characters, and this will appear as part of the Call Reference)
Description	Fuller description of problem. Include the full email address of your Practice/Premises shared mailbox usually in format Dental.practicename@nhs.scot or Optom.practicename@nhs.scot etc.
Are there any error messages?	Describe error message and any error message numbers. If error message too long to type out, take photo and attach as file to this call
What steps have you taken to resolve this issue	Say what you’ve tried e.g. using different Practice/Premises computers, etc.
Asset number	Click arrow button and select ‘ not listed – not listed ’
Make and model of device	Leave blank
Accurate location	Type practice address
Availability at this location	Enter your working hours
 Attach files	Click the paperclip and add any photos/screenshots of error messages which you need to save first on your Practice/Premises computer

Click ‘Request’ button on the right hand side, and take a note of the call reference number when it appears – this will start with either SR or INC. You will need this if you need to contact eHealth.

Log out by clicking on your initials in the top right hand corner, and selecting 'Logout'.

You will be emailed progress updates on your Fresh Service request.

If for any reason you can't access Fresh Service on the internet, you can call the eHealth Helpdesk (Mon-Fri, 9am-5pm) on 0131 536 5050:

- Select 1 for Service Desk, then...
- Select 1 for Password Resets, or 2 for Faults

If you want an update on your request, call the eHealth Helpdesk on the above number, or send a message by going into Fresh Service, finding your Open Request or Open Incident on the right-hand side of the main screen, clicking on the relevant request and submitting your message.

If you change your mind when filling in a request form on Fresh Service and want to not submit it, quit by clicking your initials in the top right-hand corner of the screen and select 'Logout'.

If you need any further help or advice regarding logging calls on Fresh Service, or have any issues which may require escalation, please contact the relevant primary care Liaison Team.

MULTI FACTOR AUTHENTICATION (MFA) ISSUES

If you have chosen Authenticator App as your verification method, and this stops working, you can try uninstalling and reinstalling the app on your mobile. If there is still a problem, your line manager can call the eHealth Helpdesk on 0131 536 5050 and they will log a call on your behalf to reset your password/MFA.

Contractor NHS Email Request Form



Please select request type:

☐ New User ☐ Change Details ☐ Leaver Notification

Section 1 – User Identity:

Forename Middle Initial(s)

Surname Job Title

Phone Number

Current NHS Email *(for changes / leavers only)*

Section 2 – Location:

Location Name

Location Type ☐ Pharmacy ☐ Optician ☐ Dental practice ☐ Other (please note below)

NHS Site Code (if known)

Location Address

Shared practice mailboxes you require access to (if any)

Section 3: Declaration:

I The Above Named Have Read and Understand the NHS eMail Terms and Conditions of Use (Attached):

Signature

Date

1. About this document

- 1.1. This document explains how the NHS.Scot mail service should be used. It is your responsibility to ensure that you understand and comply with this policy. It ensures that:
 - 1.1.1. You understand your responsibilities and what constitutes abuse of the service
 - 1.1.2. Computers and patient data are not put at risk

2. General information about the NHS.Scot mail service

- 2.1. NHS.Scot mail services are established to help with the provision of health and social care and this should be your main use of the service. There may be circumstances under which it is necessary for someone other than yourself to view the contents of your files and folders within NHS.Scot mail, for example if you have a secretary or PA that organises your diary.
- 2.2. If you are a member of clinical staff you may use the NHS.Scot mail service in relation to the treatment of private patients in accordance with your own professional codes of conduct.
- 2.3. NHS staff contact details are provided to the NHS.Scot mail Directory to support healthcare and for the delivery of healthcare in the interests of patients, these details will be shared across the NHS.

3. Your responsibilities when using the service

- 3.1. General Responsibilities:
 - 3.1.1. You must not use the NHS.Scot mail service to violate any laws or regulations of the United Kingdom or other countries. Use of the service for illegal activity is usually grounds for immediate dismissal and any illegal activity will be reported to the police. Illegal activity includes, but is not limited to, sending or receiving material related to paedophilia, terrorism, incitement to racial harassment, stalking and sexual harassment and treason. Use of the service for illegal activity will result in the immediate suspension of your NHS.Scot mail account.
 - 3.1.2. You must not use the NHS.Scot mail service for personal commercial gain. This includes, but is not limited to: marketing, advertising and selling goods or services.
 - 3.1.3. You must not attempt to interfere with the technical components, both hardware and software, of the NHS.Scot mail system in any way.
 - 3.1.4. When you set up your NHS.Scot mail account you must identify yourself honestly, accurately and completely.

- 3.1.5. You must ensure your password and answers to your security questions for the NHS.Scot mail system are kept confidential and secure at all times. You should notify your LOA if you become aware of any unauthorised access to your NHS.Scot mail account.
- 3.1.6. Email messages are increasingly a source of viruses and they often sit within attached documents. NHS.Scot mail has anti-virus protection although occasionally, as with any email service, a new virus may not be immediately detected by the software. If you are unsure of the source of an email or attachment you should leave it unopened and inform your local IT services. You must not introduce or forward any virus or any other computer programme that may cause damage to NHS computers or systems. If you are found to be deliberately responsible for introducing or forwarding a programme that causes any loss of service, NHS Scotland may seek financial reparation for this from your employing organisation.
- 3.1.7. You must not use the NHS.Scot mail service to disable or overload any computer system or network.

3.2. Responsibilities when using NHS.Scot mail email service:

- 3.2.1. You must not attempt to disguise your identity or your sending address.
- 3.2.2. You must not send any material by email that could cause distress or offence to another user. You must not send any material that is obscene, sexually explicit or pornographic. If you need to transmit sexually explicit material for a valid clinical reason then you must obtain permission from your local Caldicott Guardian. [Note: GPs may need to refer to the Caldicott Guardian at their local Healthboard].
- 3.2.3. You must not use the NHS.Scot mail service for harassment by sending persistent emails to individuals or distribution lists.
- 3.2.4. You must not forward chain emails or other frivolous material.
- 3.2.5. It is your responsibility to check that you are sending email to the right recipient, as there may be more than one person with the same name. Always check that you have the correct email address for the person you wish to send to - this can be done by checking their entry in the NHS Directory.
- 3.2.6. Email is admissible as evidence in a court of law and messages are classified as legal documents. Internal emails may also need to be disclosed under the Freedom of Information Act 2000. Emails should be treated like any other clinical communication and care should be taken to ensure that content is accurate and the tone is appropriate.

3.3. Responsibilities when using the NHS.Scot mail directory service:

- 3.3.1. It is your responsibility to make sure that your details in the NHS.Scot mail directory service are correct and up to date.
- 3.3.2. You must not use the NHS.Scot mail directory service to identify individuals or groups of individuals to target for commercial gain, either on your behalf or on that of a third party.

3.4. Information Governance Issues

3.4.1. The General Medical Council (GMC) Good Medical Practice guidance requires doctors to keep clear, accurate and legible records. It is important that emails do not hinder this. You should ensure that relevant data contained in emails is immediately attached to the patient record. Failure to do so could have implications to patient safety.

4. Using NHS.Scot mail to exchange sensitive information

4.1. The NHS.Scot mail service is a secure service. All information that is sent within the service (i.e. from an '@nhs.scot' to an '@nhs.scot' address) is encrypted whilst in transit. This means that NHS.Scot mail is authorised for sending sensitive information such as clinical data between NHS.Scot mail addresses. If you intend to use the service to exchange sensitive information you should adhere to the following guidelines:

- 4.1.1. You should make sure that any exchange of sensitive information is part of an agreed process. This means that both those sending and receiving the information know what is to be sent; what it is for and have agreed how that information will be treated.
- 4.1.2. Caldicott principles should apply whenever sensitive information is exchanged.
- 4.1.3. As with printed information, care should be taken that sensitive information is not left anywhere that it can be accessed by other people, e.g. on a public computer without password protection.
- 4.1.4. When you are sending sensitive information you should always request a delivery and read receipt so that you can be sure the information has been received safely. This is especially important for time-sensitive information such as referrals.
- 4.1.5. You must not hold patient identifiable data in your calendar if your calendar is shared with other people who may not be involved in the care of that patient.
- 4.1.6. If patient identifiable information is visible to other people, it is your responsibility to make sure that those people have a valid relationship with the patient.
- 4.1.7. You must always be sure that you have the correct contact details for the person (or group) that you are sending the information to. If in doubt you should check the contact details in the NHS Directory.