

# Registration Authority

## Standard Operating Procedure

### *Care Identity Service (CIS)*

### Directly Assign or Unassign a Position (No Request Sent to RA)

For Sponsors (B1300)

#### **ATTENTION**

This document should only be used for Sponsors who have been set up and authorised to directly assign or unassign a position to/from a smartcard.

Not all of the organisation's positions can be directly assigned. Refer to document "CIS Sponsor Submit Request to Assign or Unassign Position" or contact the Registration Authority for assistance.



## Purpose of this Document

This document defines the process to be followed by an approved Sponsor in order to directly assign an access control position (smartcard access rights) to/from an End User's smartcard.

## Information

Distribution	NECS Registration Authority
Further Copies From	Registration Authority Appleton House Lanchester Road Durham DH1 5XZ  Tel 0300 555 0340 <a href="https://servicedesk.necsu.nhs.uk/category/smartcards/">https://servicedesk.necsu.nhs.uk/category/smartcards/</a>
Document Reference	

## Version Control

Version	Release	Author	Approved By	Comments
0.1	12/02/2015	Nicky Murray		First draft
1.0	23/02/2015	Nicky Murray	Pam Robertson	Final
1.1	26/02/2016	Nicky Murray	Pam Robertson	Reviewed – no changes
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1.3	30/01/2018	Nicky Murray	Pam Drayton	Amended system requirements and added NHS Digital IA screen login screenshots.
1.4	26/01/2019	Nicky Murray	Pam Drayton	Minor rewording
1.5	21/04/2020	Nicky Murray	Pam Drayton	Removal of BTIA images, minor rewording
1.6	07/08/2021	Nicky Murray	Adam Morris	Minor rewording

## Review

Review Date
On an annual basis where possible and to incorporate system supplier upgrades
Review Date 07/08/2022



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## 1 About this Document

### 1.1 Purpose

This document defines the process to be followed by an approved Sponsor in order to directly assign an access control position (smartcard access rights) to/from an End User's smartcard. No request will be submitted to the RA Service to be reviewed and granted.

### 1.2 Target Audience

Approved Sponsors who provide support to end users who have been set up and authorised to use directly assignable positions.

### 1.3 Responsibility

The Sponsor must remain fully aware, understand and be conversant with the content of this document as a prerequisite to directly assign or unassign a smartcard access control position to/from an End User's smartcard in the Care Identity Service (CIS) application.

### 1.4 Key Requirements

An End User has an active smartcard and the Sponsor requires the End User to have smartcard access to their system

## 2 Sponsor Directly Assign/Unassign a Position in CIS

### 2.1 Scope

This process applies when using the Care Identity Service application to directly assign or unassign a smartcard access control position.

### 2.2 General Description

This process document defines the process to be followed by an approved Sponsor in order to directly assign an access control position (smartcard access rights) to/from an End User's smartcard. No request will be submitted to the RA Service to be reviewed and granted.

### 2.3 Key Requirements

**Care Identity Service (CIS) requirements:** Machines must conform to the Spine Warranted Environment. Please see specification information here <https://digital.nhs.uk/spine>

**PLEASE NOTE: The organisation IT Service/System Supplier is responsible for ensuring the above requirements are met. The Registration Authority is NOT responsible for this.**



### 3 PROCESS STEPS

#### 3.1 Directly Assign a Position to End User's Smartcard

Insert the Sponsor smartcard into the usual smartcard reader. A prompt will appear requesting the passcode/PIN to be entered.

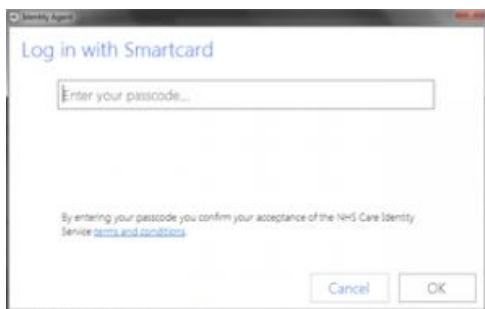


Fig 1 – Log on to NHS Spine Portal – enter passcode

Enter passcode/PIN and press Enter. If the Sponsor has more than one role, click the session role required.

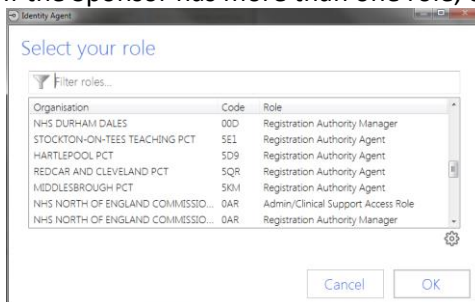


Fig 2 – Log on to NHS Spine Portal – select session role

Note: Fig 2 will not appear if the Sponsor has only one role. The following message will display upon successful authentication.

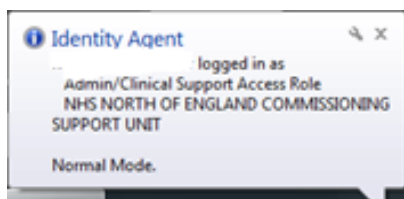


Fig 3 – “You are logged on as...”

Go to the **NHS Spine Portal** by either double clicking on the appropriate desktop icon or start the Web Browser (Internet Explorer etc) and enter the following exact address into the Address Bar (NOT a search box) and press Enter.

<https://portal.national.ncrs.nhs.uk/>

The **NHS Spine Portal** will load. If prompted with any security warnings, they must be accepted.

If the NHS Spine Portal fails to load, contact the organisation IT Service Desk/System Supplier.

## National Health Service Spine Portal



### NHS Applications

You have access to the following applications. Select the one you would like to launch by clicking on the link.

*Note that all applications are launched in a child window.*

Fig 4 – NHS Spine Portal – Available applications menu

## Click “[Launch Care Identity Service](#)”

If prompted with any security warnings, they must be accepted. The **Care Identity Service Dashboard** will load.  
If the Care Identity Service application fails to load, contact the organisation IT Service Desk/System Supplier.



Fig 5 – Care Identity Service (CIS) Dashboard “landing page”

**Find the End User.** From the Dashboard, type the End User’s 12 digit **UUID** from the front of the card into the Search field and click **Search**. The results page will load.

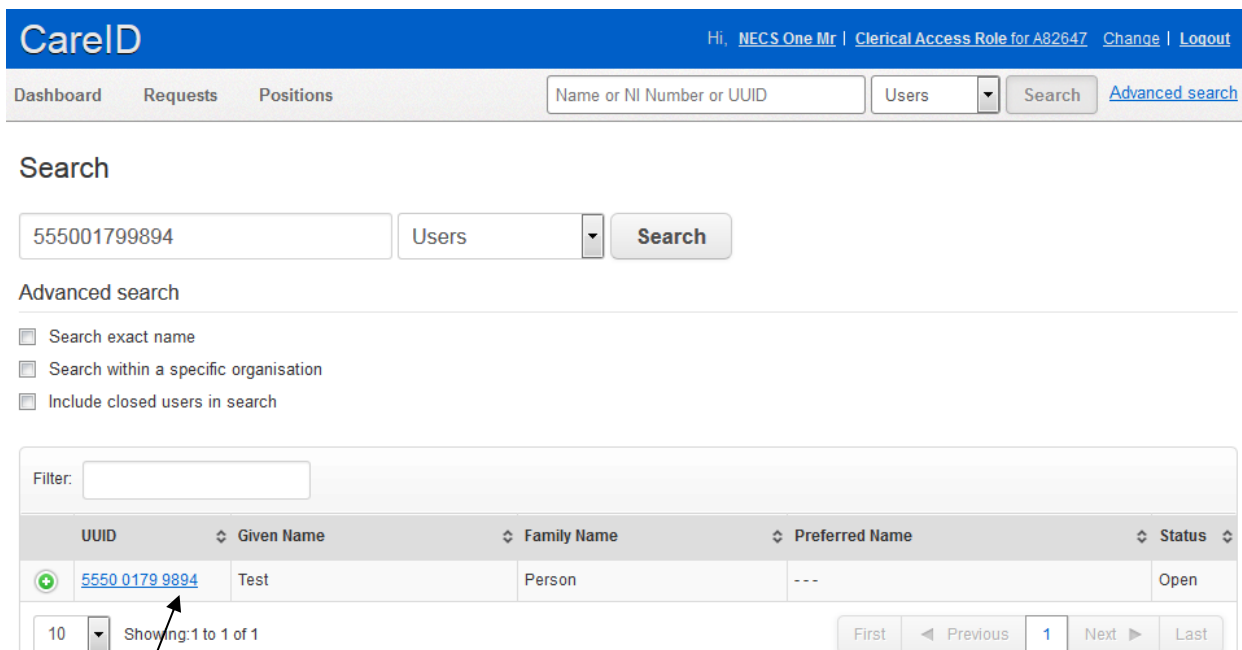


Fig 6 – Care Identity Service – Search results page

Click on the **UUID** hyperlink. The selected End User’s details will be displayed, along with their photograph for verification purposes.



Fig 7 – Care Identity Service – User Details Page inc photograph

Scroll down the page to the **Position Assignment Details** section. This will show any other smartcard positions currently assigned for other organisations for information.

**Position Assignment Details**

No Positions added.

Modify Position assignment

Fig 8 – Care Identity Service – Position Assignment Details

Click the **Modify Position Assignment Button**.

Create - Modify Position Assignment Request

**Applicant Details**

Name: Test Person      UUID: 5550 0179 9894

**Modify Position Assignment**

Valid date format is DD-MMM-YYYY, for example 12-Jun-2015.

- Directly assignable Position, no request will be submitted to RA
- Raise request to assign Position

No Positions added.

Add Position

Fig 9 – Care Identity Service – “Create – Modify Position Assingment Request”

Select **Directly Assignable Position**..... then click **Add Position**.



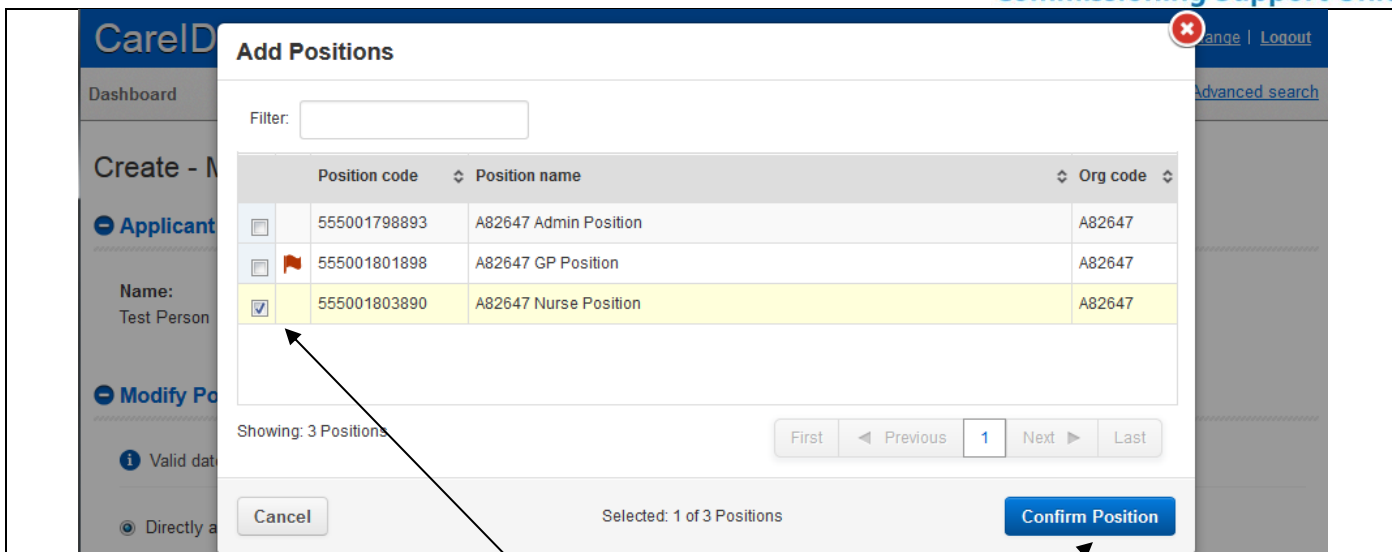


Fig 10 – Care Identity Service – Add Available Positions

Select the most appropriate position via the **tick box** then click **Confirm Position**.

⚠ Take great care when selecting an appropriate position. Usually an End User should only have one position in an organisation. ONLY appropriately qualified users should have certain positions e.g. only a qualified independently prescribing nurse should have Nurse Independent Prescriber etc.

⚠ If the desired position is not listed, it may not be directly assignable. Refer instead to document “CIS Sponsor Submit Request to Assign or Unassign Position”

⚠ If in any doubt, contact the Registration Authority for assistance.

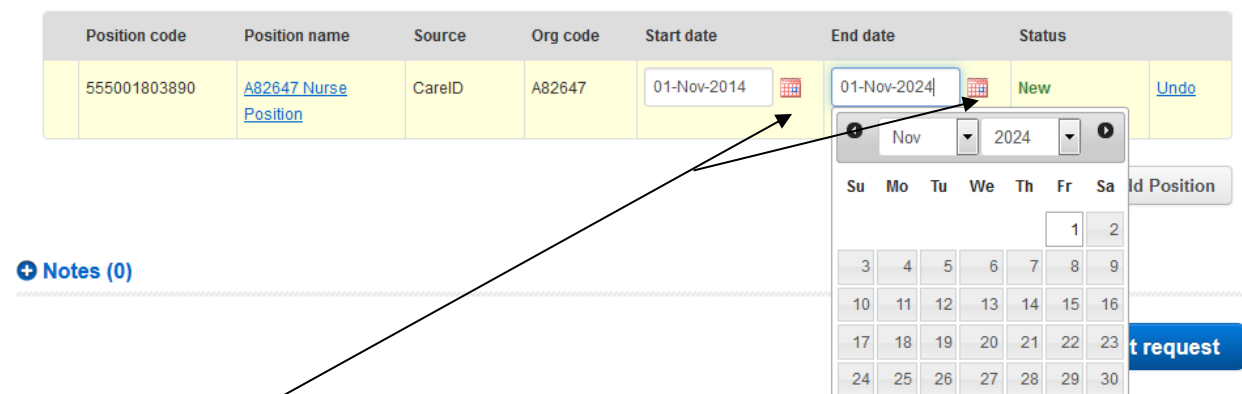


Fig 11 – Care Identity Service – Edit Start and End Dates

The **start date** and **end date** can be edited if desired via the calendar icons so that the access automatically begins and ends on the selected dates. **The end date should be set to ONE DAY AHEAD of the desired end date.** For example, if the access position should end on a Friday, the end date should be set to the Saturday. The position will then terminate at midnight on Friday night/Saturday morning.

⚠ If the calendar icons are not visible, click the “pencil” icon to edit the dates.

If the start date and end date are left alone, the position will start today and remain active for ten years or until it is unassigned.





Notes (0)

Submit request

Fig 12 – Care Identity Service – Submit Request (Assign)

Scroll to the bottom of the page. If satisfied, click **Submit Request**.

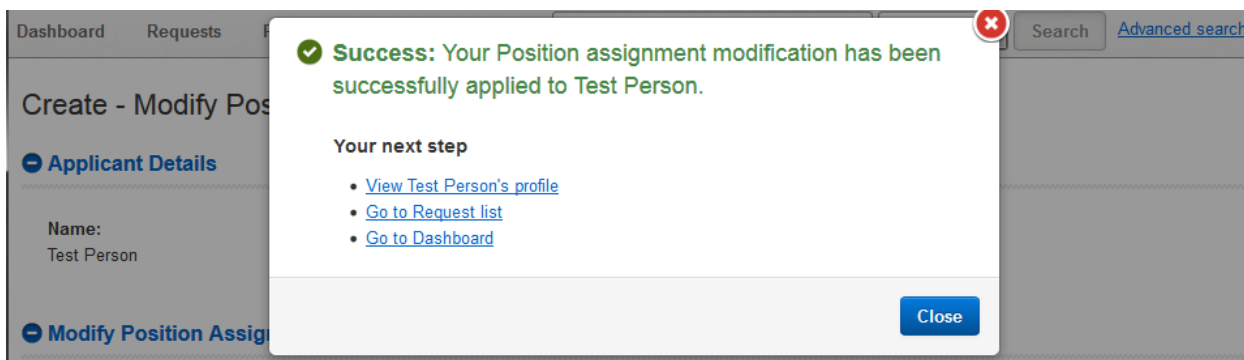


Fig 13 – Care Identity Service – Position Assigned

The request will be submitted and the access control position will be applied to the End User’s smartcard on the chosen Start Date. Click **Close** or the desired option.

### 3.2 Directly Unassign a Position from an End User’s Smartcard

To directly unassign a position from an End User’s smartcard, the Sponsor should follow the process as described above in **3.1 Submit Request to Assign Position to End User’s Smartcard** to retrieve the user’s details.

Scroll down to **Position Assignment Details** which will detail any currently assigned positions. Click on **Modify Position Assignment**.

#### Position Assignment Details

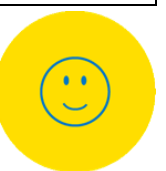
Position code	Position name	Source	Org code	Start date	End date	Last modified
555001476894	<a href="#">QAR NECS Basic Position</a>	CareID	X09	02-Jan-2015	02-Jan-2015	16-Jan-2015

Modify Position assignment

Fig 14 – Care Identity Service – Modify Position Assignment

The **Create – Modify Position Assignment Request** page will load.

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Modify Position Assignment

Valid date format is DD-MMM-YYYY, for example 12-Jun-2015.

- Directly assignable Position, no request will be submitted to RA
- Raise request to assign Position

Position code	Position name	Source	Org code	Start date	End date	Status	
555001803890	<a href="#">A82647 Nurse Position</a>	CareID	A82647	01-Nov-2014	01-Nov-2024	Unchanged	

Fig 15 – Care Identity Service - Create – Modify Position Assignment

Ensure the **Directly Assignable Position** option is selected. To immediately remove the position, click the “**dust bin**” icon. To future date the removal, click the “**pencil**” icon then edit the desired End Date and **press Tab**. Remember the end date should be set to **ONE DAY AHEAD** of the desired end date.

- ⚠ ATTENTION** – If the position is not visible when “Directly Assignable Position” is selected, it may have originally been assigned via the “Raise request to assign Position” option. Refer instead to document “CIS Sponsor Submit Request to Assign or Unassign Position” or contact the Registration Authority for assistance.
- ⚠** Only the Registration Authority can remove a Sponsor position from a user.

The **Status** will now change to **Pending Removal** or **Pending Update**.

- Directly assignable Position, no request will be submitted to RA
- Raise request to assign Position

Position code	Position name	Source	Org code	Start date	End date	Status	
555001803890	<a href="#">A82647 Nurse Position</a>	CareID	A82647	01-Nov-2014	01-Nov-2024	Pending removal	

Fig 16 – Care Identity Service – Edit Remove Position

Notes (0)

Fig 17 – Care Identity Service – Submit Request (Unassign)

Scroll down. With the desired changes confirmed, click on **Submit Request**.

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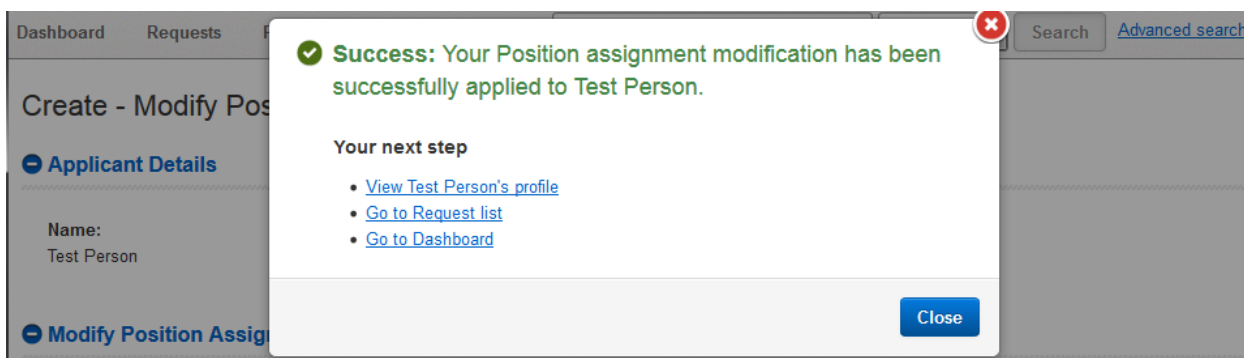


Fig 18 – Care Identity Service – Position Unassigned

The request will be submitted and the access control position will be removed from the End User’s smartcard either immediately or on the chosen End Date. Click **Close** or the desired option.

END

## 4 Roles and Responsibilities

### 4.1 Sponsor

- Unlock smartcard when required
- Perform assisted renewal of End User smartcard certificates if required
- Raise requests for new user smartcard registration/changes in core identity (name change etc)
- Approve End User access control position assignment including ending position assignment
- Ensure End Users are aware and adhere to the RA Terms and Conditions
- Be familiar with this and other relevant RA processes

