

Assigning Smartcard Access via CIS

(Log in with Smartcard Profile 'System Support Access Role' to perform below)

Sponsors, **managed** by HBL RA services, are allocated the privilege to directly assign/remove access to positions for your practice/organisation.

The positions are created for you, with the Practice Manager/Organisational Sponsor's agreement, by the HBL RA team.

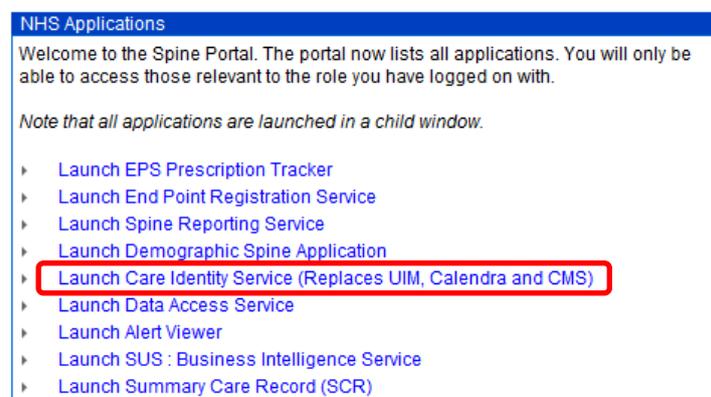
Via the NHS Portal, you can view the positions available to you, view who is allocated to a position and amend access to the position.

Note:

- Whilst carrying out this process, you should always have the smartcard of the user with you. You will need to use the UUID on the card to search for the user and you will also need to verify their identity by looking at both the card and the user to make sure they are the same person.
- You cannot assign access to any position with the sponsor activity code (B1300) associated to it. You will need to complete an RA02 form and submit it to the HBL RA team to process for you.
- You do not have to use this electronic system – you can continue to submit RA02 forms to the HBL RA team if you wish.

1. Searching by UUID

- 1.1. From the NHS Portal (<https://portal.national.ncrs.nhs.uk/portal/>), launch **Care Identity Service (Replaces UIM, Calendra and CMS)**.



- 1.2. In the top bar, type the UUID of the user in the “Given & Family Name ...” box and click on the **search** button.



A search bar with a text input field containing the placeholder text "Given & Family Name, NINO or UUID". To the right of the input field is a dropdown menu currently showing "Users" with a downward arrow. Further right is a "Search" button. The input field and the "Search" button are highlighted with red boxes.

- 1.3. The user’s name and UUID should then appear on the screen. To select the user, click on the UUID



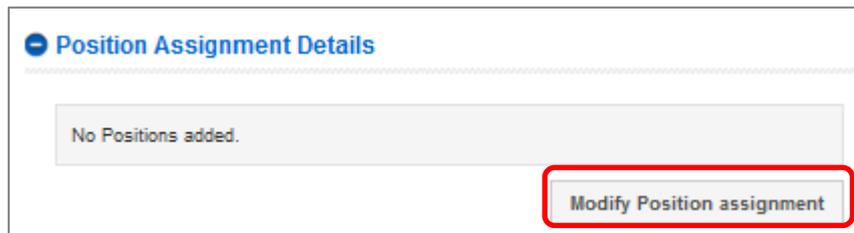
A table showing search results for users. The table has three columns: "UUID", "Given Name", and "Family Name". The first row contains the values "5888 4583 4017", "Test", and "Test". The "5888 4583 4017" value is highlighted with a red box.

UUID	Given Name	Family Name
5888 4583 4017	Test	Test

- 1.4. The user’s details and photograph will then be displayed.
- 1.5. Ensure that the photograph on the system, the photograph on the card and the user match.
- 1.5.1. If they do not, or there is no photo displayed, please **stop** as there could be a risk of fraud. Contact your RA team for assistance.
- 1.6. Scroll down the page until you get to position assignment details.

2. Add a Position

- 2.1. To add a position assigned to the user at your practice, click on **Modify Position Assignment**



A screenshot of the "Position Assignment Details" screen. It shows a message "No Positions added." and a "Modify Position assignment" button. The button is highlighted with a red box.

- 2.2. Then click on **Add Position**



A screenshot of the "Create - Modify Position Assignment Request" screen. It shows the "Applicant Details" section with "Name: Test Test" and "UUID: 5888 4583 4017". Below that is the "Modify Position Assignment" section with a date format instruction and two radio button options: "Directly assignable Position, no request will be submitted to RA" (selected) and "Raise request to assign Position". At the bottom right, there is an "Add Position" button highlighted with a red box.

- 2.3. Select the position(s) to be applied by clicking into the position's check box and click on **Confirm Position**

Add Positions

Filter:

	Position code	Position name	Org code
<input type="checkbox"/>	555211843109	King George Surgery Locum/Doctors In Training R8000	E82086
<input type="checkbox"/>	555258547109	King George Surgery Medical Secretary R8006	E82086
<input checked="" type="checkbox"/>	555258583104	King George Surgery Receptionist R8009	E82086
<input type="checkbox"/>	555289988106	King George Surgery HCA R8003	E82086
<input type="checkbox"/>	555290123104	King George Surgery Midwife R8016	E82086

Showing: 14 Positions

First Previous 1 2 Next Last

Cancel Selected: 1 of 14 Positions **Confirm Position**

- 2.4. To apply the position, click on **Submit Request**.

Create - Modify Position Assignment Request

Applicant Details

Name: Test Test UUID: 5686 4563 4017

Modify Position Assignment

Valid date format is DD-MM-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
555258583104	King George Surgery Receptionist R8009	CareID	E82086	08-Jul-2015	08-Jul-2025	New

Add Position

Notes (0)

Submit request

- 2.5. The position is applied – to confirm, click on **View User's profile**.

Success: Your Position assignment modification has been successfully applied to Test Test.

Your next step

- [View Test Test's profile](#)
- [Go to Request list](#)
- [Go to Dashboard](#)

Close

2.6. Scroll down to Position Assignment Details which will show the position applied.

Position Assignment Details

Position code	Position name	Source	Org code	Start date	End date	Last modified
555258583104	King George Surgery Receptionist R8009	CareID	E82086	08-Jul-2015	08-Jul-2025	08-Jul-2015

[Modify Position assignment](#)

3. Remove a Position

3.1. To remove a position assigned to the user at your practice, search and locate the user on the CIS system, then click on **Modify Position Assignment**

Position Assignment Details

Position code	Position name	Source	Org code	Start date	End date	Last modified
555258583104	King George Surgery Receptionist R8009	CareID	E82086	08-Jul-2015	08-Jul-2025	08-Jul-2015

[Modify Position assignment](#)

3.2. Click on the pencil  to the right of the position to be removed.

Modify Position Assignment

i 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
555258583104	King George Surgery Receptionist R8009	CareID	E82086	08-Jul-2015	08-Jul-2025	Unchanged 

[Add Position](#)

3.3. Click into the **End date** field. Enter today's date to close access effective immediately and then click on **Submit Request**.

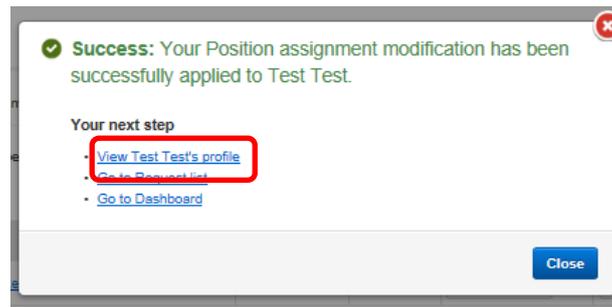
Position code	Position name	Source	Org code	Start date	End date	Status
555258583104	King George Surgery Receptionist R8009	CareID	E82086	08-Jul-2015	09-Jul-2015	Pending update Undo

Notes (0)

[Add Position](#)

[Submit request](#)

3.4. The position is removed – to confirm, click on [View User's profile](#).

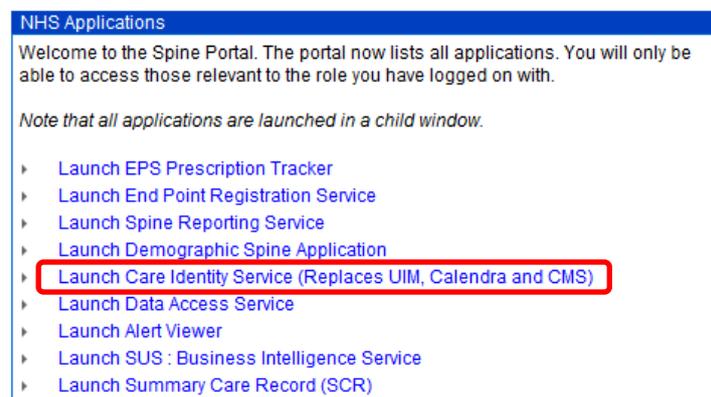


3.5. Scroll down to Position Assignment Details which will show the position removed.

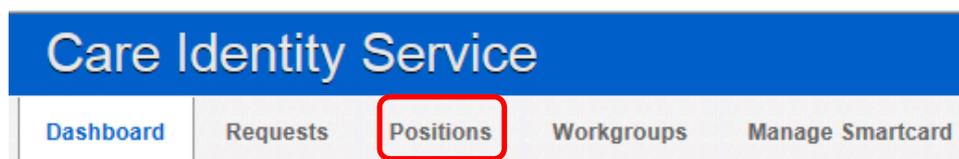


4. Viewing your Organisation's Positions

4.1. From the NHS Portal (<https://portal.national.ncrs.nhs.uk/portal/>), launch [Care Identity Service](#) (Replaces UIM, Calendra and CMS).



4.2. In the top bar, click on the [Positions](#) button.



4.3. The positions available for your organisation are listed – you may need to click on the **Next** ▶ button to view additional positions.

Manage Positions - E82086 - KING GEORGE SURGERY | [Change](#)

Include closed Positions Include System Generated Positions (names begin with 00SYSPOS)

Filter:

Position code	Position name	Org code	Opened on	Status
555290016104	King George Surgery Computer Room Staff R8008	E82086	07-Apr-2015	Open
555289940101	King George Surgery Dispensing Assistant R8003	E82086	07-Apr-2015	Open
555211723104	King George Surgery GP R8000	E82086	24-Mar-2015	Open
555289986106	King George Surgery HCA R8003	E82086	07-Apr-2015	Open
555619677104	King George Surgery Lead Receptionist R8008	E82086	21-May-2015	Open
555211843109	King George Surgery Locum/Doctors In Training R8000	E82086	24-Mar-2015	Open
555258547109	King George Surgery Medical Secretary R8006	E82086	31-Mar-2015	Open
555290123104	King George Surgery Midwife R8016	E82086	07-Apr-2015	Open
555211932107	King George Surgery Nurse - Non-Prescriber R8001	E82086	24-Mar-2015	Open
555211991109	King George Surgery Nurse - Prescriber R8001	E82086	24-Mar-2015	Open

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◀ Previous 1 2 **Next** ▶ Last

4.4. Click on a **position name** to view more information about it.

Position: King George Surgery Midwife R8016

Position Details

Position code: 555290123104 Position name: King George Surgery Midwife R8016 Position description: ---

Organisation name: E82086 - KING GEORGE SURGERY Created by: [Milburn Gary](#) Created on: 07-Apr-2015 at 14:19

Status: Open

Access Profile Details

ID	Role	Role name	Org code	Last modified
555290122103	R8016	Midwife Access Role	E82086	21-May-2015

Predecessor Positions

No predecessor Position exists.

Approval Details (3)

[Newton Sarah](#) | 21-May-2015 at 14:00

Items changed:

Activities added:
B0370 - View Summary Health Records

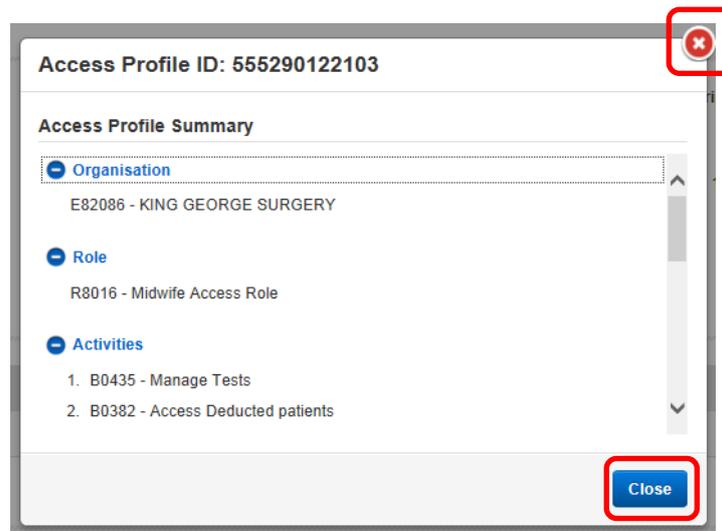
[View assigned users](#)

- 4.5. To view the activity codes allocated to the position, click on the **ID** link, which brings up the information in another window.

Access Profile Details

ID	Role	Role name	Org code	Last modified
555290122103	R8016	Midwife Access Role	E82086	21-May-2015

- 4.6. Use the scroll bar to view all the information and click on **Close** or the **X** to close the window.



- 4.7. To view the users assigned to the position, scroll to the bottom of the page and click on the **View assigned users** button.

View assigned users

- 4.8. A list of users assigned to the position selected is displayed. Click on the name of a user to remove access if required (see section 3.1 for instructions on how to do this).

Users Assigned to Position - King George Surgery Midwife R8016

Filter:

UUID	Legal name	Preferred name	Start date	End date
8481 0115 4047	Katie Headlam	---	26-May-2015	26-May-2025
2818 4257 3566	Rohan McCarty	---	26-May-2015	26-May-2025
3592 2559 4035	Tracy Doughty	---	26-May-2015	26-May-2025

10 Showing: 1 to 3 of 3

First  Previous **1** Next  Last