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health and care together



Informatics Merseyside

Training Guide

Smartcard Sponsor

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imerseyside.nhs.uk

Quick links

Important information	3
Smartcard login	3
Apply for Care ID system	4
Login to apply for Care ID	4
Start a new application	7
Requirements for applicant	9
Manage the application process	9
Check application progress	9
Application Dashboard	11
Care Identity Management system	14
Sponsor smartcard management	14
Add user access	14
Unlock a smartcard	17
Smartcard certificate renewal	18
General smartcard management	20
Setup smartcard self service unlock	20
Smartcard self service unlock	22
Smartcard certificate self renewal	23
Contact details	25
Training service information	25
Change control	25
Document approval	25

Important information

The Care Identity Service (CIS), which was used to manage Smartcards, has been retired in 2024. The system has been replaced by **Care Identity Management (CIM)**, which allows Registration Authority Sponsors and other users to complete several tasks which include the management of access to patient data, the addition and removal of Smartcard profile roles, and Smartcard unlock.

The creation of a new Smartcard user must be done in the **Apply for Care ID** system. This system will manage the requirements for the allocation of a Smartcard to a new user, as well as the process to complete verification.

It is strongly recommended that the Smartcard holder registers with a valid **NHS, AC** or **GOV** email address, to enable functions such as Smartcard Self Unlock.

Smartcard login

- Insert the **Smartcard** into the card reader → enter the **Passcode** → select **OK**.

terms and conditions.'"/>

- Highlight the required **Organisation** → select **OK**.

Organisation	Code	Role
INFORMATICS MERSEYSIDE HQ	YDDG3	Registration Authority Agent
INFORMATICS MERSEYSIDE HQ	YDDG3	Registration Authority Agent
INFORMATICS MERSEYSIDE HQ	YDDG3	Registration Authority Agent
INFORMATICS MERSEYSIDE HQ	YDDG3	Registration Authority Agent
INFORMATICS MERSEYSIDE HQ	YDDG3	Registration Authority Agent
INFORMATICS MERSEYSIDE HQ	YDDG3	Registration Authority Agent
INFORMATICS MERSEYSIDE HQ	YDDG3	Registration Authority Agent
INFORMATICS MERSEYSIDE HQ	YDDG3	Registration Authority Agent

The **Identity Agent** box will display in the bottom right of the screen with the details of the **Smartcard Authentication**.



Apply for Care ID system

Login to apply for Care ID

- Log into a Smartcard → select the **NHS Portal** icon on the desktop.



If the desktop icon is not available, users should enter the URL directly into their browser.
<https://apply-for-care-identity.care-identity-serice2.nhs.uk/start>.

- → select **Apply for Care ID**

Page contents

- [Top of page](#)
- [NHS applications](#)
- [Check your smartcard setup](#)

NHS applications

- [Apply for Care ID](#)
- [EPS Prescription tracker](#)
- [National Care Records Service \(NCRS\)](#)
- [Care Identity Management \(CIM\)](#)
- [End Point Registration Service](#)
- [Digital SR1 service \(new service\)](#)
- [Spine Reporting Service](#)

The **Apply for Care ID** will open.

- Click **Start**.

Apply for Care ID

Apply for Care ID is a secure online ID verification service for NHS users to submit and verify their documents online.

Once their identity has been verified, a profile will be created for them in Care Identity Service (CIS).

Use the service to:

- enter applicant details to invite them to apply
- update Care ID applications you have submitted
- check the progress of Care ID applications

Start

Before you start

You will need Windows Hello, a Security Key or smartcard with one of these roles assigned to use Apply for Care ID:

- RS090: Registration Authority manager
- RS090: Registration Authority agent
- B1300: Sponsor

For support using Apply for Care ID [view the Apply for Care ID guidance](#)

- Click **Log in**.

Log in

Use Windows Hello, your Security Key or Smartcard with the right permissions or roles to log in and use the Apply for Care ID service.

If you cannot change your roles or permissions, contact your manager or [NHS Trust's registration authority](#)

Log in

- Select **Smartcard** as the login method → tick **Remember my selection** → click **Continue**.

Select your login method

☒ Smartcard

☐ Windows Hello

☐ Security key

☐ iPad app

Continue

☒ Remember my selection



When logged in for the first time, an email address must be set up for applicants to contact should they have any queries.

- Click **Go to settings**.

NHS Apply for Care ID

Tracey Campbell: Admin/Clinical Support Access Role, INFORMATICS MERSEYSIDE HQ (YDDG3) [Log out](#)

Go to settings to set your contact email address and help for applicants.

Apply for Care ID

[New application](#) [Upload multiple applications](#)

- In the **Email address** field, click **Change**.

Settings

Contact email address

The ID checking team might use this to contact you about applications you've raised.

Email address Tracey.campbell@imerseyside.nhs.uk [Change](#)

Help for your applicants

This email address will be displayed to your applicants, so they can contact you or your team if they need support.

Email address Tracey.campbell@imerseyside.nhs.uk [Change](#)

- Select the current email address option or select **Use a different email address** → enter the new email address → click **Continue**.

Help for your applicants

Select an email address that will be displayed to your applicants, so they can contact you or your team if they need support.

This can be a shared mailbox

☐ Tracey.campbell@imerseyside.nhs.uk

☒ Use a different email address

Email address

Training@imerseyside.nhs.uk

Continue



A shared inbox or email address can be used for contact.

A 6 digit security code will be sent to the email address used.

- Enter the received verification code into the box → click **Continue**.

Verify support email address

Use the 6 digit security code that has been sent to Training@imerseyside.nhs.uk to verify your email address.

The security code will expire in 1 hour from when it was sent.

The code contains 6 numbers

Continue

[Not received a security code?](#)

- Click **Home** to return to the dashboard.

NHS Apply for Care ID

Tracey Campbell: Admin/Clinical Support Access Role, INFORMATICS MERSEYSIDE HQ (YDDG3) [Log out](#)

Home Search applications Help Settings

Settings

Start a new application

- From the **Apply for Care ID** homepage, click **New application**.

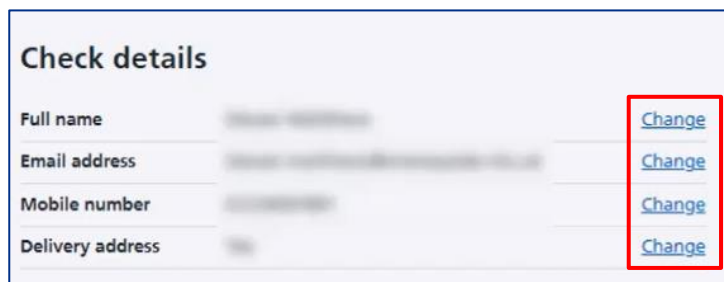
- Enter all the applicant's personal details into the required fields.

The applicant's personal mobile phone number can be entered as this is used for the download of the **Verify Care ID app**, which allows for their proof of identity documents to be uploaded. Similarly, the applicant's personal email address can be used at this stage if they do not yet have an **NHS**, **AC**, or **GOV** email address.

A valid **NHS**, **AC**, or **GOV** email address should be added once created. Without a valid email address, the user will not be able to access self service functions such as **Smartcard Self Unlock**.

- Select **Yes**, for the applicant to provide a delivery address → click **Continue**.

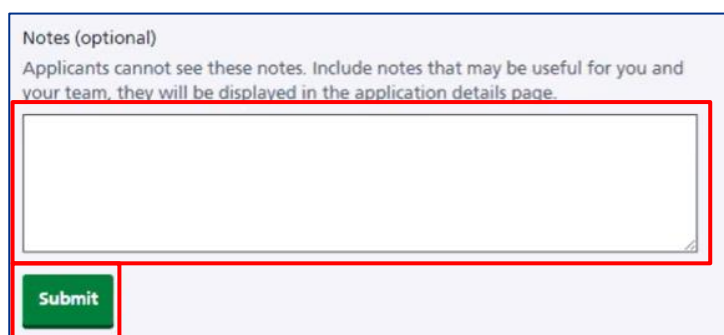
- Check the details provided and make any changes required.



Check details

Full name	Change
Email address	Change
Mobile number	Change
Delivery address	Change

- In the **Notes** field, include the access position name that is required. Alternatively, if this is not known, enter the name and Smartcard number of a member of staff for their access to be duplicated.



Notes (optional)
Applicants cannot see these notes. Include notes that may be useful for you and your team, they will be displayed in the application details page.

[Submit](#)



The position can only be added for the ODS code the Sponsor accesses. To add further roles from multiple sites, request access via **Care Identity Management**, once the Smartcard has been created.

- Click **Submit**.

The request will be submitted and a link will be sent to the applicant's email address to confirm their details and to their mobile phone to verify their identity documents.

Application sent

Application ID
239def89-eb86-43b3-870e-6d2bc32b9c0c

What happens next

The applicant will be sent a link to an online form to enter their personal details.

Then they will be sent a link to an NHS app called Verify Care ID to upload documents and photograph their face to verify their identity.

Automated checks will be carried out on the applications and it may also be reviewed manually.

The applicant will receive an email that explains what they need to do and how to use the mobile app.

You will be notified when an ID has been checked and is ready to progress to the next stage.

New application

[Or manage applications](#)

Requirements for applicant

The applicant must complete the steps in the two links that are automatically generated from the system. Failure to complete any of the required steps will delay the issue of the Smartcard or the sponsor may be required to resubmit the application.


Applicants must upload the required identity documents and a photograph of their face into the **Verify Care ID app**. This photograph will be printed on the Smartcard.

The applicant will also be asked for a delivery address. This address can be home or work, however, if a work address is used, they must include the department or ward name to ensure it arrives in the right location.

Manage the application process

Check application progress

- Click **Search applications**.

 Apply for Care ID

Tracey Campbell: Registration Authority Agent, INFORMATICS MERSEYSIDE HQ (YDDG3)

Log out

Home

Search applications

Help

Settings

- Enter the applicant's **Name**, **email address**, or **application ID** → tick **Application I have raised** → click **Search**.

Home Search

Search all applications

Name, email address or application ID

Org code(s)
For multiple ODS codes include a space between each one. For example, Y54 A3A8R RW4

Raised by
☐ Applications I have raised

Status
☐ In progress
☐ Resend Required
☐ Approved
☐ Duplicate
☐ Rejected
☐ Cancelled

Search

- Select the **Applicant name**.

Showing 4 results for [redacted]

Applicant name	Email address	Last updated on	Org code	Raised by	App ID	Status
[redacted]	[redacted]	7 May 2024	YDDG3	Campbell Tracey Mrs	239def89-eb86-43b3-870e-6d2bc32b9c0c	In Progress
[redacted]	[redacted]	29 Apr 2024	YDDG3	Campbell Tracey Mrs	f2aa74b2-ecd8-47d6-815b-3e9a8f0faeef	Cancelled

The **Application** steps show the progress of the application as **Not Started**, **In Progress**, or **Completed**.

Application: [Redacted]
 Status: In Progress

[Resend invite email](#)
[Cancel application](#)

Application summary

Application number	239def89-eb86-43b3-870e-6d2bc32b9c0c
Raised by	Campbell Tracey Mrs on 7 May 2024 3:51pm
ODS code	YDDG3
Last updated	7 May 2024 3:51pm
Invite emails sent	1

Applicant details

Full name	[Redacted] Change
Email address	[Redacted] Change
Mobile number	[Redacted] Change
Notes	Change

Application steps

Enter personal details	Not Started
Submit ID documents	Not Started
Review by ID checker	Not Started

If required, the invite email can be resent to an applicant, or the application can be cancelled via the option on the screen.

Application Dashboard

On the **Apply for Care ID** homepage, a dashboard is available which displays the status of all submitted current applications. There may be actions required for an application.

Resend required

- Select the **Resend required** tab.

Resend required (13)
In progress (14)
Approved (1)
Duplicates (3)
Rejected (6)
Cancelled (39)

Resend required applications

[Resend selected](#)
[Cancel selected](#)

Sort by

Newest

	Applicant name	Raised on	Raised by	Last updated	Reason
<input type="checkbox"/>	[Redacted]	3 May 2024	Beswick Graeme Mr	7 May 2024	Invite email expired
<input type="checkbox"/>	[Redacted]	2 May 2024	Bond Philip Mr	6 May 2024	Invite email expired

A list of applications where the applicant has not actioned their required steps within 3 days will be displayed.

To refresh the application:

- Tick the box next to the **Applicant name** → click **Resend selected**.

A new email link will be sent to the applicant.

Smartcard Sponsor Guide V1.1
 Return to [Quick links](#)

Page 11 of 25

In progress

To view the list of applications that are currently in progress:

- Select the **In progress** tab.

The screenshot shows the 'In progress' tab selected, highlighted with a red box. The interface displays a table of 'In progress applications' with columns for 'Raised on', 'Raised by', and 'Last updated'. A 'Sort by' dropdown menu is set to 'Raised on (newest)'. The table shows one application raised on 8 May 2024 by Maunder James Mr.

Approved

To view applications which have been approved but the Smartcard has not yet been posted:

- Select the **Approved** tab.

The screenshot shows the 'Approved' tab selected, highlighted with a red box. The interface displays a table of 'Approved applications' with columns for 'Applicant name', 'Approved on', 'Raised by', 'UUID', and 'ID checker notes'. A 'Mark as done' button is visible. The table shows one application approved on 7 May 2024 by Yates Abigail Miss. A 'Sort by' dropdown menu is set to 'Newest'.



Sponsors must not move applications from the approved list to Marked as done, as the RA team use this list to track any Smartcards that need to be actioned and then posted out.

Duplicates

If a Smartcard profile already exists for an application, it will be identified as a Duplicate application.

- Select the **Duplicates** tab.

The screenshot shows the 'Duplicates' tab selected, highlighted with a red box. The interface displays a table of 'Duplicate applications' with columns for 'Applicant name', 'Last updated', 'Raised by', and 'Duplicate match UUID'. A 'Mark as done' button is visible. The table shows two duplicate applications, both updated on 7 May 2024, by Bond Philip Mr and Creighton Leanne Ms. A 'Sort by' dropdown menu is set to 'Newest'.

The Registration Authority team will contact the applicant by email to inform them they already have a Smartcard profile. The Smartcard will then be posted to the applicant.



Sponsors must not move applications from the duplicates list to Marked as done. If the application is in the Marked as done list, this means that the RA team has completed the relevant actions.

Rejected

If there is an issue with the application, it will be rejected.

To view the list of rejected applications:

- Select the **Rejected** tab.

Applicant name	Rejected on	Raised by	Reason(s)
[Redacted]	7 May 2024	Blunt Melanie Ms	Smartcard photo does not meet guidelines.
[Redacted]	7 May 2024	Wood Richard Mr	Photo ID 2 is missing information. Proof of address is missing information.
[Redacted]	3 May 2024	McHugh	Smartcard photo does not meet guidelines.

The reason for the rejection will be displayed. If the Smartcard is still required, the application must be resubmitted again from the start, via the **Apply for Care ID** system.

- After the information has been reviewed, it is the Sponsor's responsibility to click **Mark as done** to remove the application from the list.

Cancelled

To view a list of cancelled applications:

- Select the **Cancelled** tab.

Applicant name	Cancelled on	Raised by	Reason
[Redacted]	7 May 2024	Creighton Leanne Ms	Other
[Redacted]	3 May 2024	De-Festa Gaynor Miss	Other
[Redacted]	3 May 2024	Gurrell Nicola Ms	Did not respond to invite emails

Applications may be cancelled for several reasons, which may include that the applicant did not respond to emails or phone contact from the Registration Authority team.

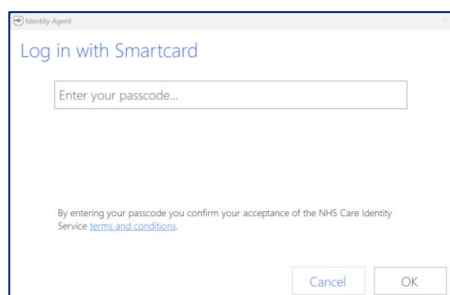
Care Identity Management system

Sponsor smartcard management

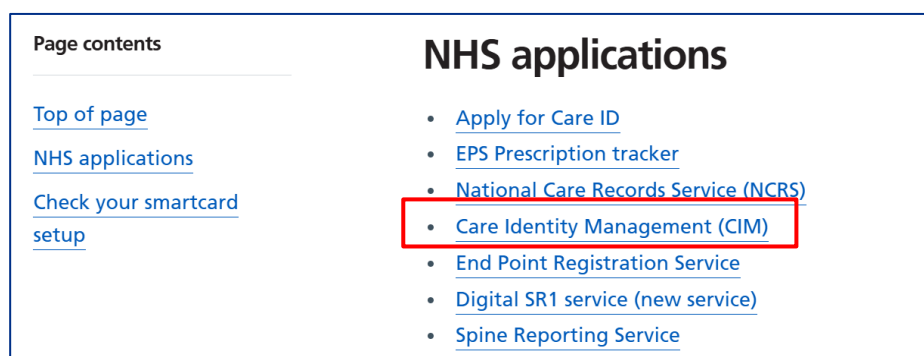
Care Identity Management (CIM) has replaced Care Identity Service (CIS) as the way sponsors will manage staff Smartcards.

Access Care Identity Management (CIM)

- Insert the Sponsor Smartcard into the computer → enter the **Smartcard passcode**.



- Navigate to [National Health Service Portal \(ncrs.nhs.uk\)](https://ncrs.nhs.uk) → select **Care Identity Management**.

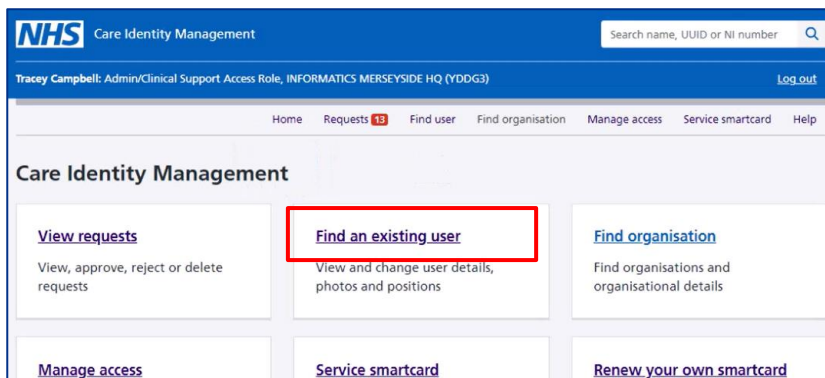


The **Care Identity Management Dashboard** will open.

Add user access

The Smartcard Team monitors the Position Request List, Monday to Friday from 8:00 AM to 5:00 PM and grants any requests which have been added. There is no longer a requirement to log a job with the IT Helpdesk, after the request has been made, via Care Identity Management. No confirmation emails are sent so it is recommended that users wait an hour for updates to be applied. Sponsors can check the status of the request and inform the user.

- Select **Find an existing user**.



- Enter the **user's Name, National Insurance number, or Smartcard UUID Number** → tick **Only show users in my organisation and child organisations** → select **Search**.

- Click **View profile** from the results.

Photo	Full name	Date of birth	UUID number	Organisation	Profile
	[redacted]	3 Mar 1987	[redacted]	INFORMATICS MERSEYSIDE HQ (YDDG3)	View profile

- Click **Add access positions**.

- Scroll down the add position list or search for the position name in the **Filter** box to find the correct option(s) → tick the required positions.

← Back to: [Add positions](#)

Add position

Organisation: INFORMATICS MERSEYSIDE HQ (YDDG3)

Filter position list

Enter position name or code

Positions I can add directly

Adding positions directly will disable the selection of other positions

There are no positions you can add directly

- ☐ EMIS Web GP Higher Role GPES Sensitive
- ☐ EMIS Web Healthcare Sensitive
- ☐ EMIS Web Higher Level Reception Sensitive
- ☐ EMIS Web Higher Level Reception LSA Sensitive
- ☐ EMIS Web Higher Level Reception LSA GPES Sensitive
- ☐ EMIS Web Meds Management Sensitive
- ☐ EMIS Web Meds Management NP Sensitive

- Review the positions selected → click **Continue**.

Positions selected

1 position selected [Remove all](#)

IM Training Blank [Remove](#)

Continue

- Enter the **Start date** for the position access to begin.

← Back to: [Add positions](#)

Request positions and dates

Position 1: IM Training Blank

Organisation: INFORMATICS MERSEYSIDE HQ (YDDG3)

Start date

For example, 12 2 2021

Day	Month	Year
12	6	2024



The position **End date** is a fixed date and should not be changed.

- Click **Request positions**.

Add note (optional)

Provide any information you'd like to record in the request report

Request positions

A message will display to say, **Position requested successfully**.

← Back to: [Search Results](#)

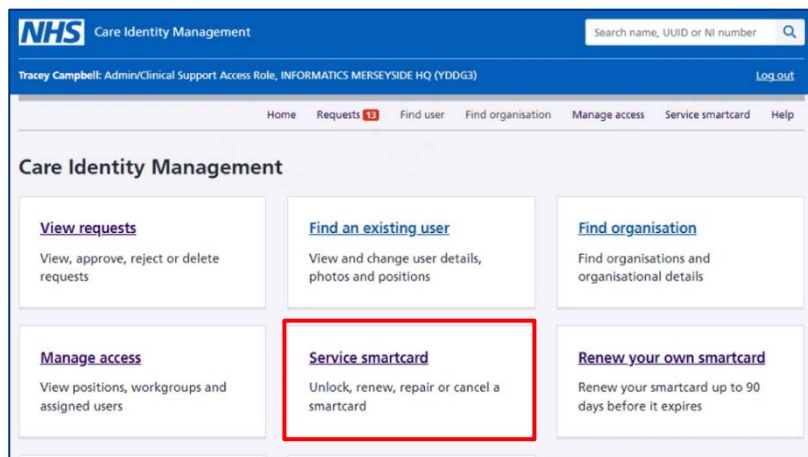
✓ Position requested successfully - [View request](#)

Unlock a smartcard

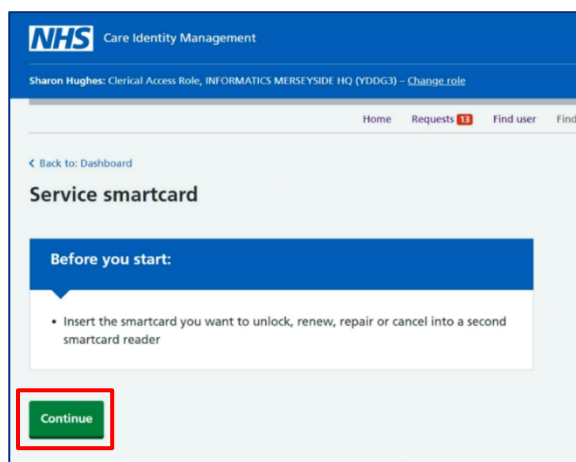
All staff should be encouraged to use the Self-Service Smartcard Unlock application when a Smartcard becomes locked. If for any reason the user cannot access the Self-Service application, the Sponsor can unlock the card.

Two Smartcard readers are required to perform this task.

- Click **Service smartcard**.



- Insert the locked Smartcard into the second Smartcard reader → click **Continue**.



- Select the option for **Unlock smartcard** → click **Continue**.

- Enter and confirm a new passcode → click **Continue**.

The smartcard will be unlocked.

Smartcard certificate renewal

A Smartcard user should renew their Smartcard certificate up to 90 days before it is due to expire. An alert will display every time a user logs in until the certificate has been renewed. It is strongly recommended that all users renew their Smartcard certificates as soon as is practical when prompted.

If a Smartcard cannot be renewed by the user, a Sponsor will have to complete the steps to renew the certificates. If a Smartcard has expired an appointment must be made with the Registration Authority team in person to have the issue rectified.



Two Smartcard readers are required to perform this task.

- Click **Service smartcard**.

The screenshot shows the NHS Care Identity Management dashboard. The user is Tracey Campbell, Admin/Clinical Support Access Role, INFORMATICS MERSEYSIDE HQ (YDDG3). The dashboard has a navigation bar with links: Home, Requests (13), Find user, Find organisation, Manage access, Service smartcard, and Help. The main content area has six tiles: View requests, Find an existing user, Find organisation, Manage access, Service smartcard (highlighted with a red box), and Renew your own smartcard. The Service smartcard tile description is: 'Unlock, renew, repair or cancel a smartcard'.

- Insert the locked Smartcard into the second Smartcard reader → click **Continue**.

The screenshot shows the 'Service smartcard' page. The user is Sharon Hughes, Clerical Access Role, INFORMATICS MERSEYSIDE HQ (YDDG3). The page has a navigation bar with links: Home, Requests (13), Find user, and Find. The main content area has a 'Back to: Dashboard' link and a 'Service smartcard' heading. Below the heading is a 'Before you start:' section with a list item: 'Insert the smartcard you want to unlock, renew, repair or cancel into a second smartcard reader'. At the bottom left, the 'Continue' button is highlighted with a red box.

- Select **Renew smartcard certificate** → click Continue.

The screenshot shows the 'Select smartcard service' page. The page has a heading 'Select smartcard service' and two radio button options: 'Unlock smartcard' (with subtext 'Change the smartcard passcode') and 'Renew smartcard certificate' (with subtext 'Update certificates to keep the smartcard active'). The 'Renew smartcard certificate' option is highlighted with a red box. At the bottom left, the 'Continue' button is highlighted with a red box.

- Have the Smartcard user enter their passcode → click **Continue**.

Once the process has been completed a message will display, **Smartcard renewed successfully**.

General smartcard management

Setup smartcard self service unlock

For users to self unlock their Smartcards, an email address will need to be added to the Smartcard profile.

When the Smartcard unlock process is underway, an email will be sent to the registered email address to confirm the identity.

- Insert the Smartcard into the computer → enter the Smartcard passcode.

- Navigate to [National Health Service Portal \(ncrs.nhs.uk\)](https://ncrs.nhs.uk) → select **Care Identity Management (CIM)**.

NHS applications

- [EPS Prescription tracker](#)
- [National Care Records Service \(NCRS\)](#)
- [Care Identity Management \(CIM\)](#)
- [End Point Registration Service](#)
- [Digital SR1 Service](#)
- [Spine Reporting Service](#)
- [TES Alert Viewer](#)
- [MESH user interface](#)
- [MESH Online Enquiry Service \(MOLES\)](#)
- [Demographic Spine Application](#)
- [NHSmail](#)
- [Link My NHS accounts](#) (connect your NHSmail account to your smartcard)

- Select **View your profile**.

The screenshot shows the NHS Care Identity Management dashboard. At the top, there's a blue header with the NHS logo and the text 'Care Identity Management'. Below the header, there's a navigation bar with the user's role 'Clerical Access Role, INFORMATICS MERSEYSIDE HQ (YDDG3)' and a 'Log out' link. The main content area is titled 'Care Identity Management' and contains six tiles. The first tile, 'View your profile', is highlighted with a red box. It contains the text 'View your profile and update contact details'. Other tiles include 'Renew your own smartcard', 'Change smartcard passcode', 'Find organisation', 'Register an iPad', and 'Help and troubleshooting'.

- Select **Change** next to the email address or Phone number field.

The screenshot shows the 'View your profile' page. It has a form with several fields: 'Full name', 'Name on smartcard', 'Date of birth', 'Email', 'Phone number', 'NI number' (with a '- Show' link), 'Passport number', and 'Driving licence number'. To the right of the 'Email' and 'Phone number' fields, there are 'Change' links, which are highlighted with a red box.

- Enter the **Work email address or mobile phone number** → click **Update**.

The screenshot shows the 'Change contact details' page. It has a header with a back link 'Back to: Rachel Main's profile'. Below the header, there's a section titled 'Change contact details'. It contains two input fields: 'Work email address (optional)' and 'Phone number (optional)'. The 'Work email address (optional)' field is highlighted with a red box. At the bottom, there's a green 'Update' button, also highlighted with a red box.



A valid **NHS**, **AC**, or **GOV** email address should be used. Without a valid email address the user will not be able to access self service functions such as **Smartcard Self Unlock**.

A confirmation message will appear to say, **Contact details changed successfully**.

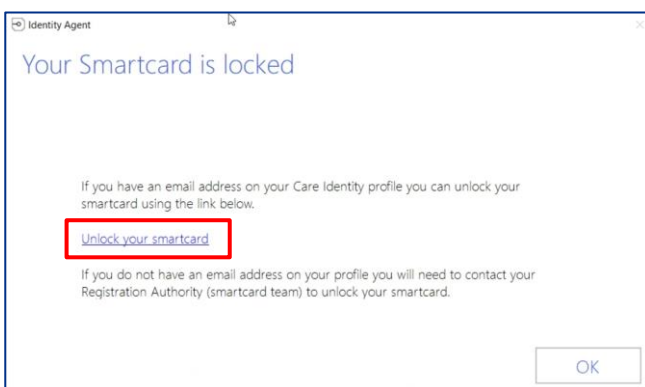
✓ Contact details changed successfully

Smartcard self service unlock

If a Smartcard is locked and an email address has been set up against the Smartcard, it can be unlocked by a user. If the user does not have an email address set up, then a different user with the correct access rights can unlock a Smartcard and reset the passcode.

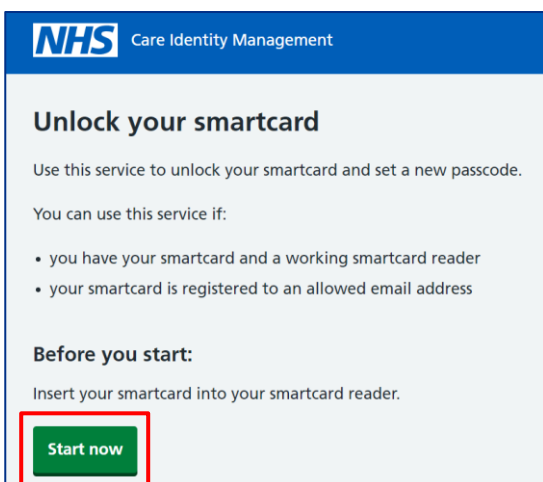
If the Smartcard is locked, a pop-up will appear.

- Click **Unlock your smartcard**.



A web browser will open.

- Click **Start now**.



An email will be sent to the registered email address or mobile phone number with a security code.

The security code is only valid for 15 minutes, if it has not been used after this time, it will need to be requested again.

- Enter the received code into the box → click **Continue**.

NHS Care Identity Management

[Go back](#)

Enter the code we sent to your email

Enter the security code that we sent to Philip.Bond@imerseyside.nhs.uk

Enter code

[Problem getting the code?](#)

Continue

- Enter a new Smartcard passcode as instructed → click **Confirm**.

NHS Care Identity Management

Enter new passcode

Enter new 6 to 8 digit passcode

Confirm 6 to 8 digit passcode

Confirm

If the passcode is accepted, a confirmation message will appear.

NHS Care Identity Management

Smartcard unlocked

Remove and reinsert your smartcard to log in using your new passcode.

Is this service useful? [Share your feedback](#).

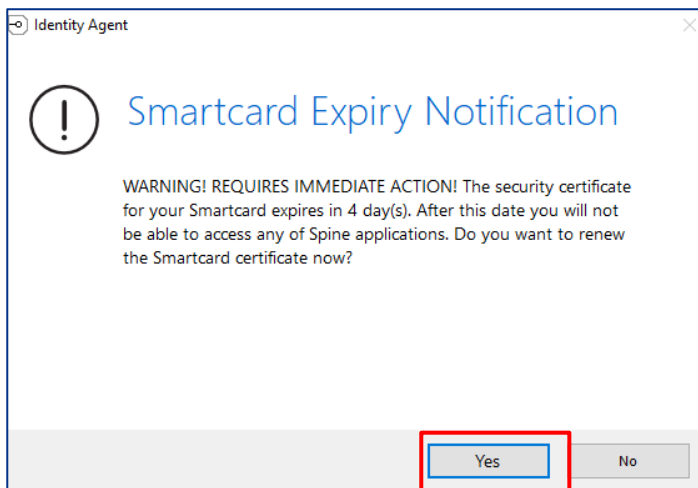
[Home](#) [Accessibility statement](#) [Cookie policy](#) [Help and guidance](#)

Smartcard certificate self renewal

If the steps below are followed, a Smartcard can be renewed within 90 days of expiry, without the need for a Sponsor.

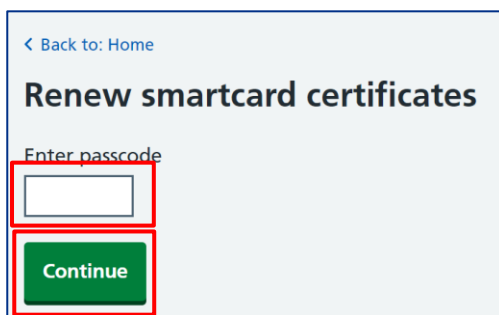
Once logged in, if the Smartcard is within 90 days of expiry, a **Smartcard Expiry Notification** will appear.

- Click **Yes** to start the update process.

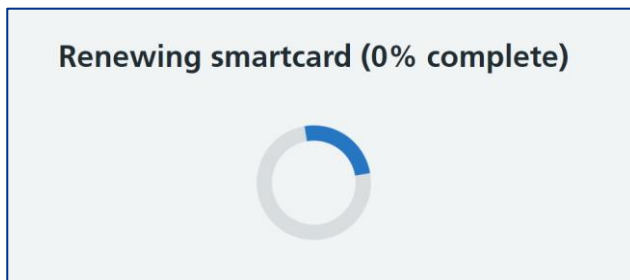


This will open up the profile on the **Care Identity Management (CIM)**.

- Enter the passcode → click **Continue**.



The system will process the renewal.



Once finalised has finished and the process is complete, a notification will appear to confirm the renewal has been successful.

Contact details

IT queries	IM IT Service Desk	Contact your IT Service Desk

Training service information

Change control

Document type	Document title	Next review date
Training Guide	Smartcard Sponsor	24 September 2025

Version	Date	Owner	Change	Purpose
V0.1	13 February 2024	Rachel Main	Created to support replacement of CIS	Creation
V1.2	16 June 2025	Rachel Main	Moved to new template	Rebrand

Document approval

Version	Date	Name	Job title	Responsibility
V1.0	24 September 2024	Rachel Bertenshaw	Digital Skills Online Learning Manager	Approver