Training Guide

Smartcard Sponsor

imerseyside.nhs.uk

Quick links

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 The system has been replaced by **Care Identity Management (CIM)**, which allows Registration Authority Sponsors and other users to complete several tasks which include the management of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**.

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

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**

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

- Click **Start**.

- Click **Log in**.

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

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**.

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

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

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

Start a new application

- From the **Apply for Care ID** homepage, click **New application**.
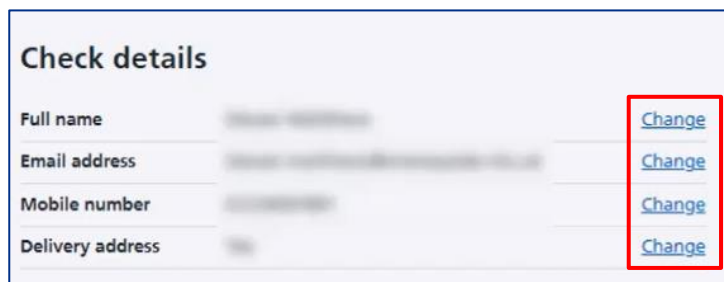
- Enter all the applicant's personal details into the required fields.

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.
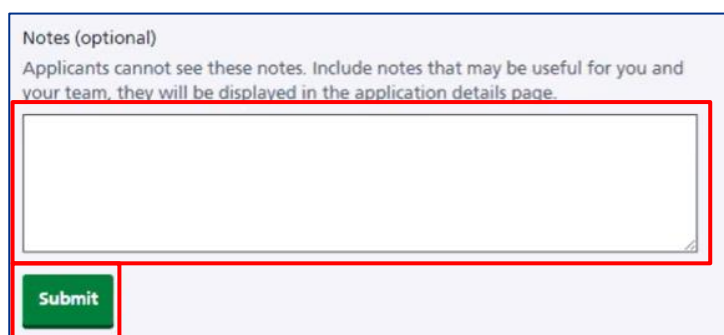

- In the **Notes** field, include the access position name that is required. Alternatively, if this is not known, enter the name and Smartcard number of a member of staff for their access to be duplicated.

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.

Requirements for applicant

The applicant must complete the steps in the two links that are automatically generated form 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**.

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

- Select the **Applicant name**.

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

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.

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.

In progress

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

- Select the **In progress** tab.

Approved

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

- Select the **Approved** tab.

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 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.

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.

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.
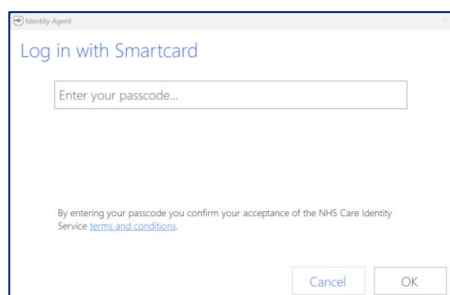
Care Identity Management system
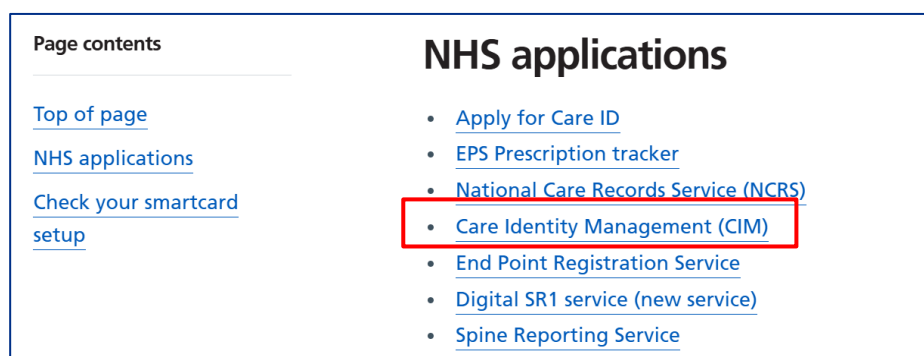
Sponsor smartcard management

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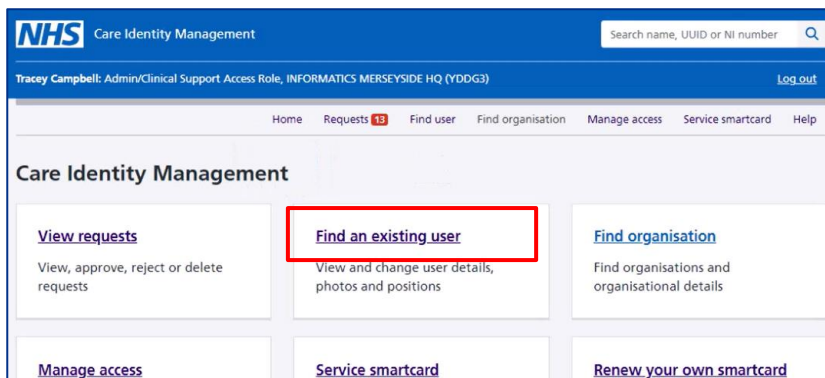
- Enter the **user's Name**, **National Insurance number**, or **Smartcard UUID Number** → tick **Only show users in my organisation and child organisations** → select **Search**.

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

- 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.

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

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

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

- Click **Request positions**.

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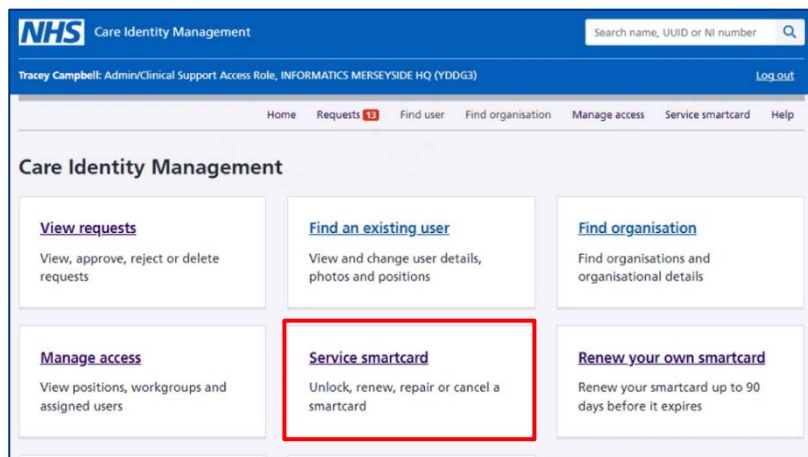
Unlock a smartcard

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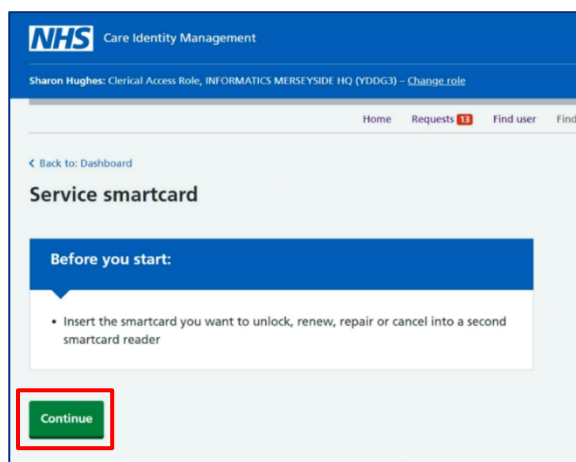
- Select the option for **Unlock smartcard** → click **Continue**.

- 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**.

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

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

- 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**.

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

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

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 and 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.
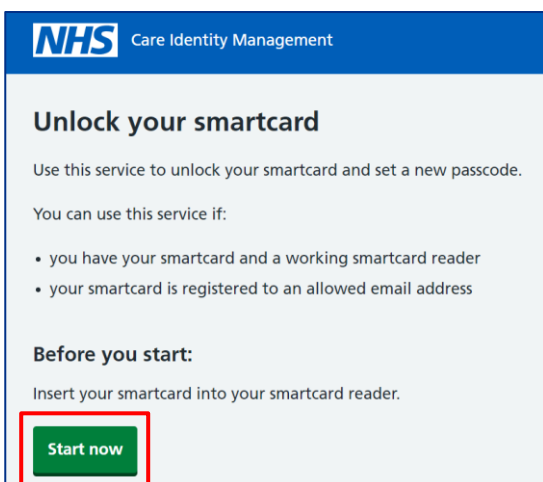
- Click **Unlock your smartcard**.
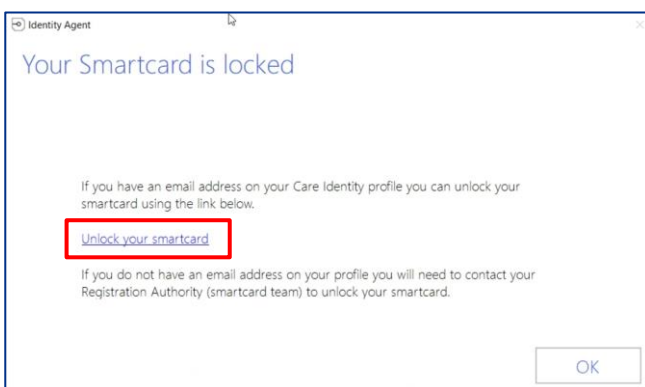
A web browser will open.

- 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**.

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

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

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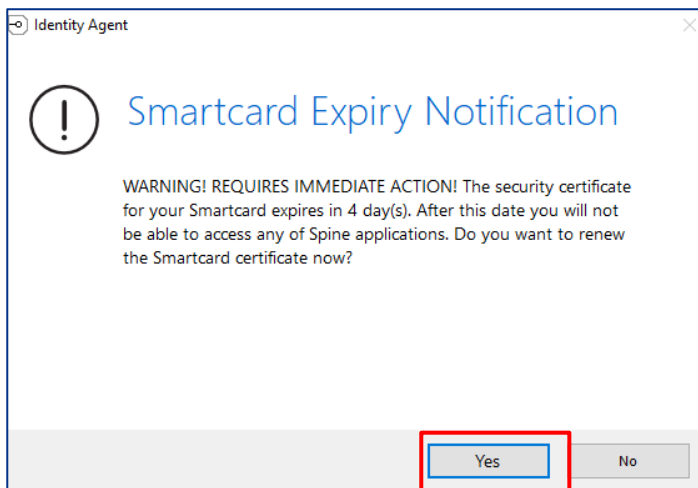
This will open up the profile on the **Care Identity Management (CIM)**.

- Enter the passcode → click **Continue**.
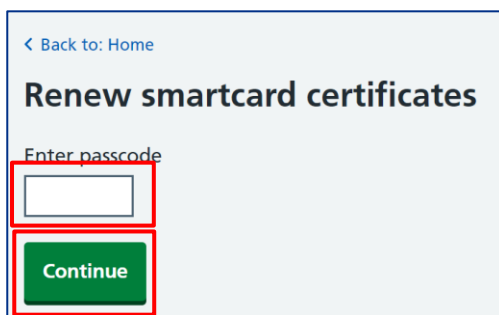
The system will process the renewal.

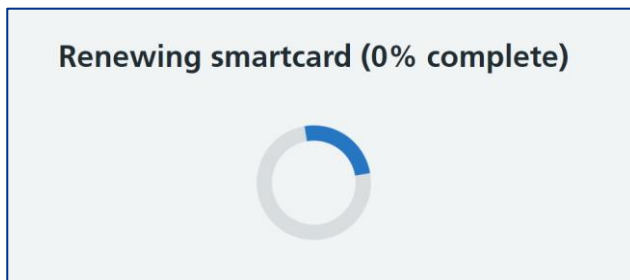Once finalised has finished and the process is complete, a notification will appear to confirm the renewal has been successful.

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
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Document approval

Version	Date	Name	Job title	Responsibility
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