



NHS Unite

Introductory Townhall

Wednesday, 27th August 2025

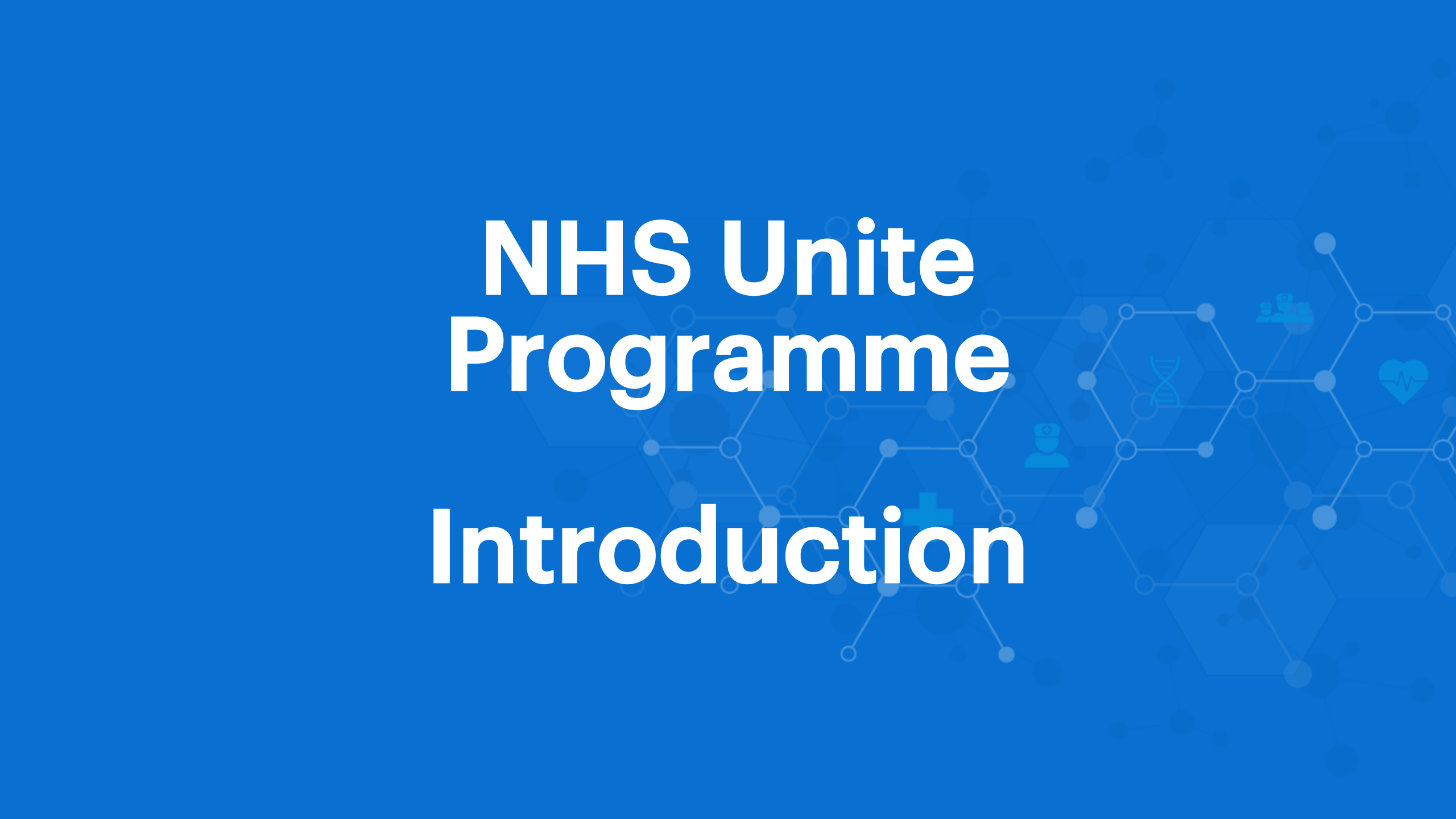
3:00pm – 4:00pm



Agenda

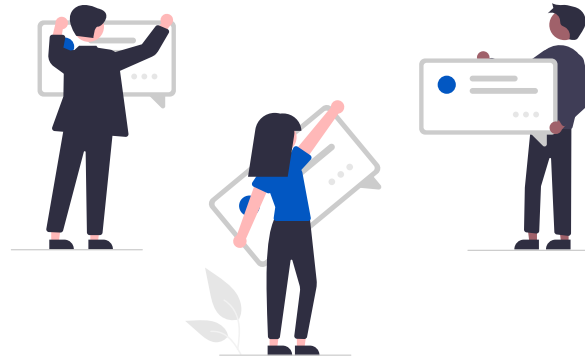
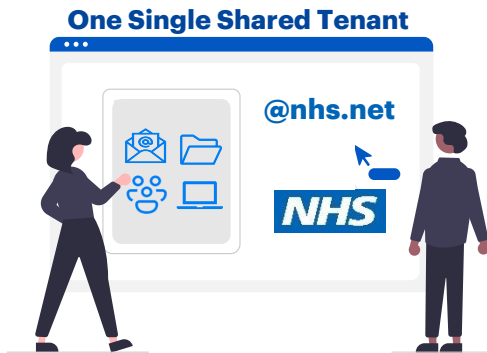
- 01** Introduction to the NHS Unite Programme
- 02** Your Migration Journey: What's included?
- 03** Migration Process Overview
- 04** Stage 1: The Front Door & The Enquiry Form
- 05** Questions & Answers

NHS Unite Programme Introduction

The background features a blue gradient with a network of white lines and dots. Several medical icons are scattered throughout: a DNA double helix, a heart with a pulse line, a person wearing a nurse's cap, a plus sign, and a group of people.

Introducing Unite Phase 2

Helping you work together across the NHS with Microsoft 365.



What is Unite?

- ✓ Unite is our national NHS programme to bring everyone into the central NHS.net shared tenant. This gives you a **secure, consistent, and connected place** to collaborate easily with colleagues across the NHS.
- ✓ If you're not yet fully on NHS.net, this is for you. We'll help you move into **one shared Microsoft 365 environment**, so everything you need is in the same place.

Why are we doing this?

- ✓ To make your **daily work simpler** - using NHS.net for email and collaboration becomes the easy, central option.
- ✓ To **reduce the complexity** of local Office 365 setups.
- ✓ To make the most of the national Microsoft 365 licence- **improving security and** keeping things consistent.

Our Approach

- ✓ **Standardised core migration**- We handle the technical work so it's as simple as possible for you, with minimal disruption to your day-to-day tasks.
- ✓ **Retiring local Office 365 setups**- We'll guide you through moving away from multiple systems to one shared platform, saving time and improving security.

What are the Benefits?

The Transition to NHS.net will bring you and your colleagues many benefits.

BetterConnected BetterCare

- ✓ **Improved Connectivity:** Secure access to digital tools and data, interoperable systems enabling smooth information sharing
- ✓ **Improved Care:** More informed decision-making, streamlined services and real-time data

Better Collaboration

- ✓ **Easy Sharing:** Quickly access shared files, calendars & Teams
- ✓ **Connect Instantly:** Find and work with colleagues across all trusts
- ✓ **Consistent Tools:** Use NHS-approved apps that work the same for everyone

A Single Point of Support

- ✓ **Local + NHS.net Help:** Your familiar local IT team supported by national expertise
- ✓ **Standard Processes:** Faster resolution and less downtime for your work

A Consistent User Experience

- ✓ **One Way to Access:** Same apps & systems, everywhere
- ✓ **One Digital Space:** Familiar, integrated experience across the NHS
- ✓ **Future Ready:** Supports the NHS digital transformation plans

One Digital Identity

- ✓ **Single Secure Login:** One account to access all Microsoft apps easily
- ✓ **Enhanced Data Security:** Your patient and organisational information stays safe, giving you peace of mind



NHS.net Connect
Better connected, better care

NHS Unite Programme

The background features a light blue hexagonal grid pattern. Scattered throughout the grid are several small, light blue icons: a DNA double helix, a heart with a pulse line, a person wearing a medical cap, a plus sign, and a group of people.






What is included?

What we'll be helping you with

We're here to make your move to the new **nhs.net** tenant. In the Unite Migration Programme, we'll help you move your key Microsoft 365 workloads and be by your side every step of the way.

We'll manage the migration of these workloads automatically, so you don't need to worry about the technical details.



	Exchange Online	Email data within user mailboxes, shared mailboxes, resource mailboxes, and online archives.
	OneDrive	Recent versions of files, folders, and their metadata.
	Teams	Teams and channels (including private), along with associated SharePoint files and team-level permissions. Team and communication sites, lists, libraries, certain web parts (supported by migration tooling), pages, files and site-level permissions.
	SharePoint	Note: After the migration, only a site's top root-level (site-wide) permissions can be retained. This means any unique permissions- such as those set on specific libraries, folders, or individual files - will not be carried over . If your team has applied unique access restrictions (e.g., for sensitive files like payroll data), these will be lost during the move and those files will be accessible to all users who have access to the root site. Please review and update your SharePoint site permissions and structure before the migration to ensure sensitive information remains protected.
	Planner	Tasks, buckets, plans and metadata linked to Teams or M365 Groups (converted into Teams if needed).

For on-premise workloads (e.g., File Shares, Home Drives), migration support may be made available at a later stage if needed. Please note, it is not included in the Unite standardised offering.

What we'll be helping you with

Tools your organisation will need to move with help from the Unite team



These workloads won't be moved automatically by the Unite team. We'll give you clear guidance and step-by-step instructions to help you complete the process.



Power BI



Powerapps



Power Automate



Microsoft Forms



Microsoft Bookings
and Shifts



How we'll support you

- **Pre-engagement and planning:** During the Front Door stage, the Unite team shall onboard you into the Programme and provide clear guidance on what to expect.
- **Preparation:** During Readiness, you shall be directed to self-serve step-by-step guidance and resources to tailor to your specific needs and migrate workloads at your own pace.



We know change can feel challenging, but you won't be doing this alone. The Unite team is here to make sure your migration journey is clear, and your Org is well-equipped with the guidance and materials needed to help you manage a smooth transition to NHS.net Connect.

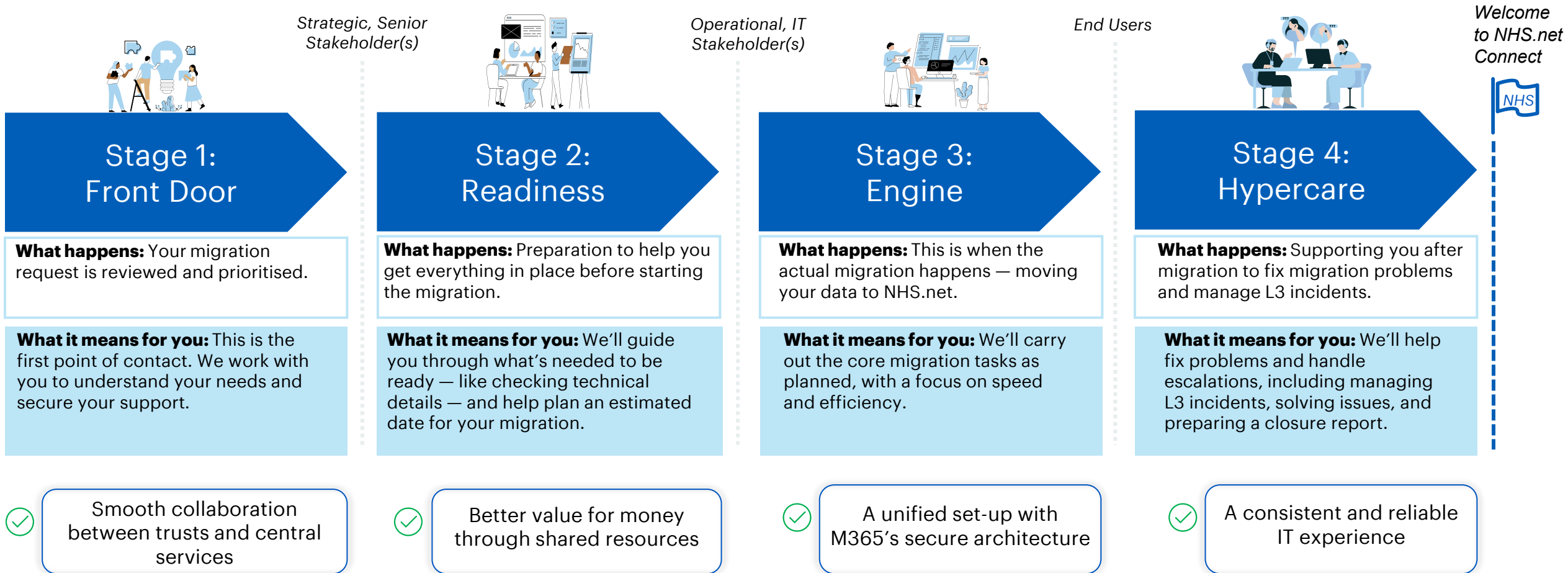
NHS Unite Programme

Migration Process Overview



Understanding Each Stage of Your Migration Journey

A step-by-step process through four stages to clearly guide your organisation from first contact through to ongoing support.

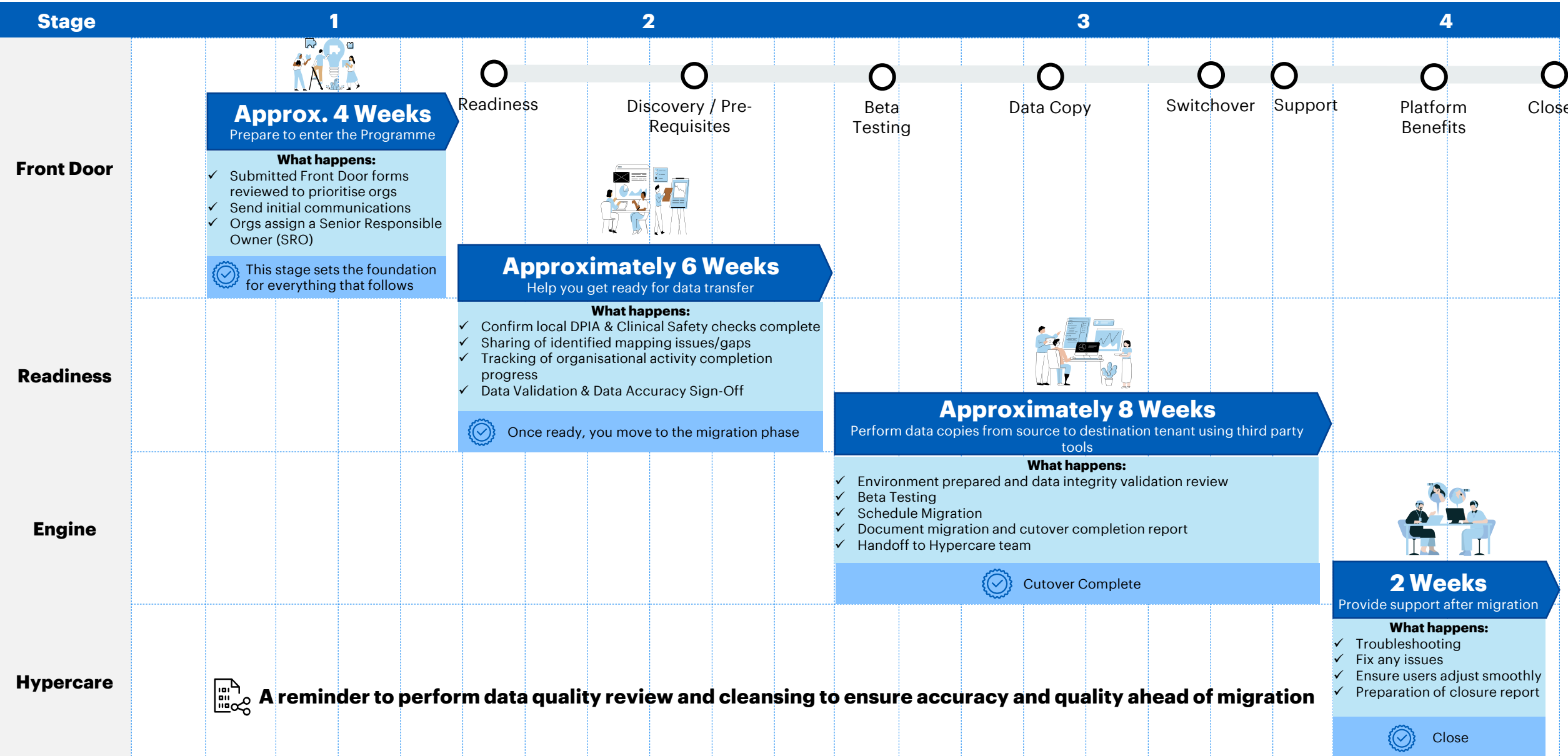


A reminder to perform data quality review and cleansing to ensure accuracy and quality ahead of migration

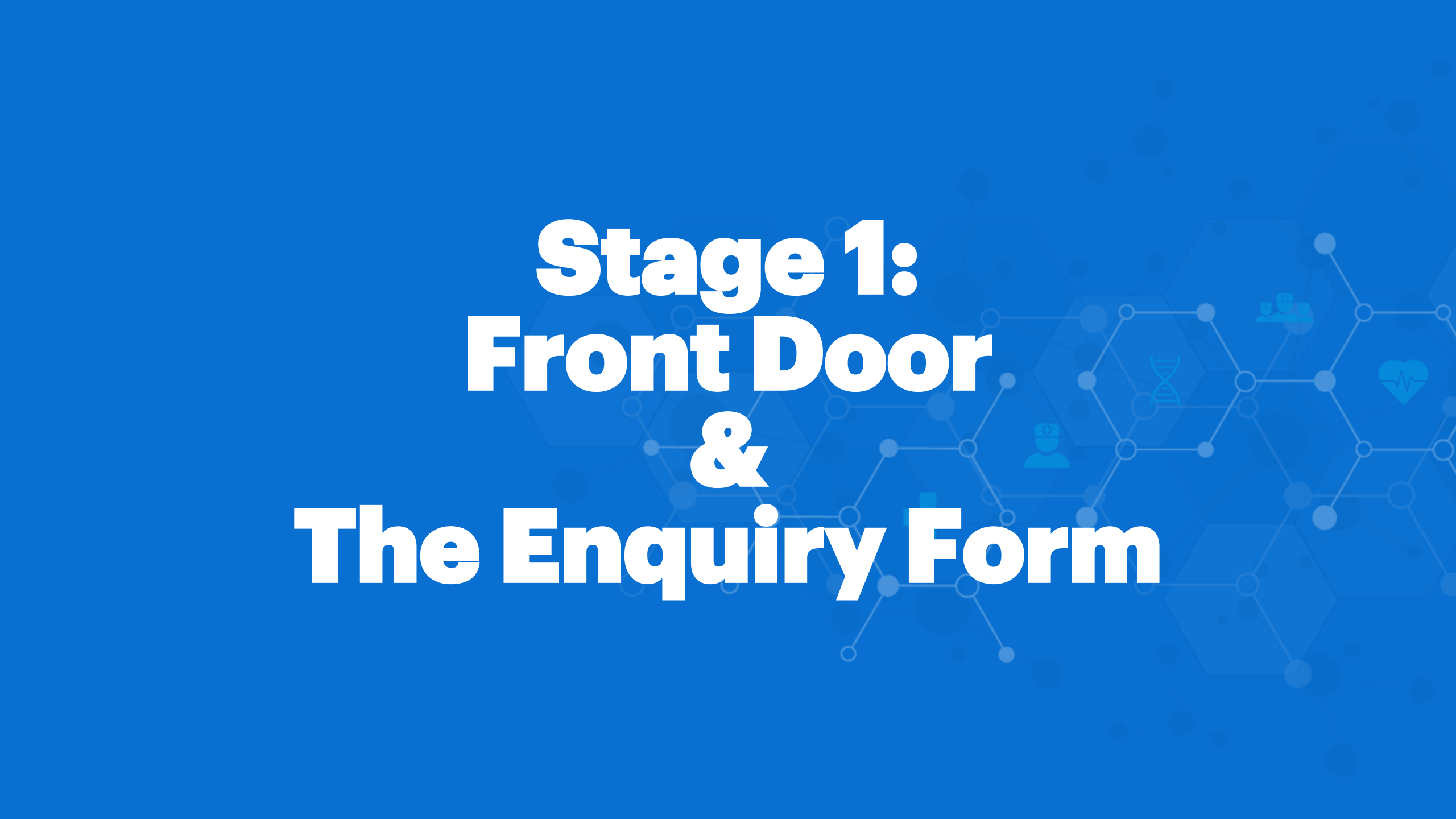
*This is an example timeline

Indicative Migration Approach*

The move to the unified tenant will happen in clear, structured stages — designed to balance speed with safety and deliver real benefits alongside managing risks effectively.



Stage 1: Front Door & The Enquiry Form

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Stage 1: Front Door

This is the starting point in your Unite migration journey

Key: *Mandatory activities to enter the Front Door

What it means for you



What is the Front Door stage?

- The Front Door is the **first step** in your migration journey
- This stage is where we **begin to engage** with your Organisation to gather key information and **confirm your readiness to begin**



How long does it take?

- Once your start window has been confirmed, the Front Door stage will run for **approximately 4 weeks but may be shorter** for Organisations who meet the exit criteria sooner



Getting Started

- Read the guidance provided by the Unite team to understand how the migration process will operate and what will be required from your Organisation
- **Complete the Front Door Enquiry Form:**
 - Provide details about your organisation's **setup and complexity**
 - Help us identify the **best time to migrate** your organisation to the NHS.net tenant
 - Support the Programme in **prioritising** your organisation's migration journey



What's expected from you in the Front Door stage?

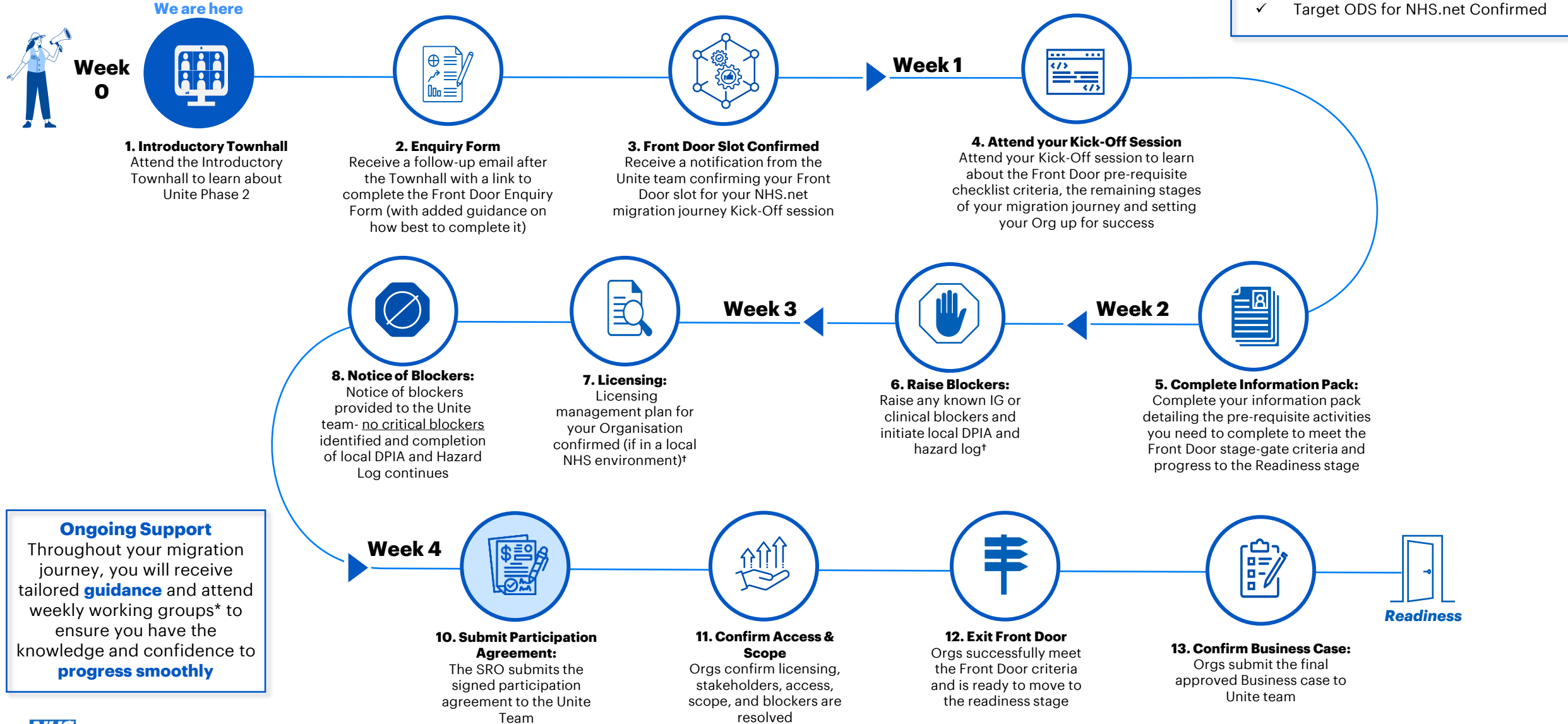
1. **Complete and submit the Front Door Enquiry Form**
2. Wait to receive confirmation of your **scheduled start window** from the Unite team
3. Attend your scheduled **Front Door Kick-Off Session†**, **complete your pre-requisite activities*** and exit the Front Door stage. Example pre-requisites include appointing your Organisation's SRO for Unite, reviewing and signing your Collaboration Agreement (to be signed by the SRO)
4. Attend your final workshop to confirm Front Door exit criteria has been satisfied and progress to the Readiness stage

Front Door Typical Journey

The Front Door stage will last up to 4 weeks but may be completed sooner.

Orgs that pre-qualify their mandatory requirements up-front or in the first 1-2 weeks may be fast-tracked, e.g.:

- ✓ SRO Appointed
- ✓ Target ODS for NHS.net Confirmed



Ongoing Support
Throughout your migration journey, you will receive tailored **guidance** and attend weekly working groups* to ensure you have the knowledge and confidence to **progress smoothly**

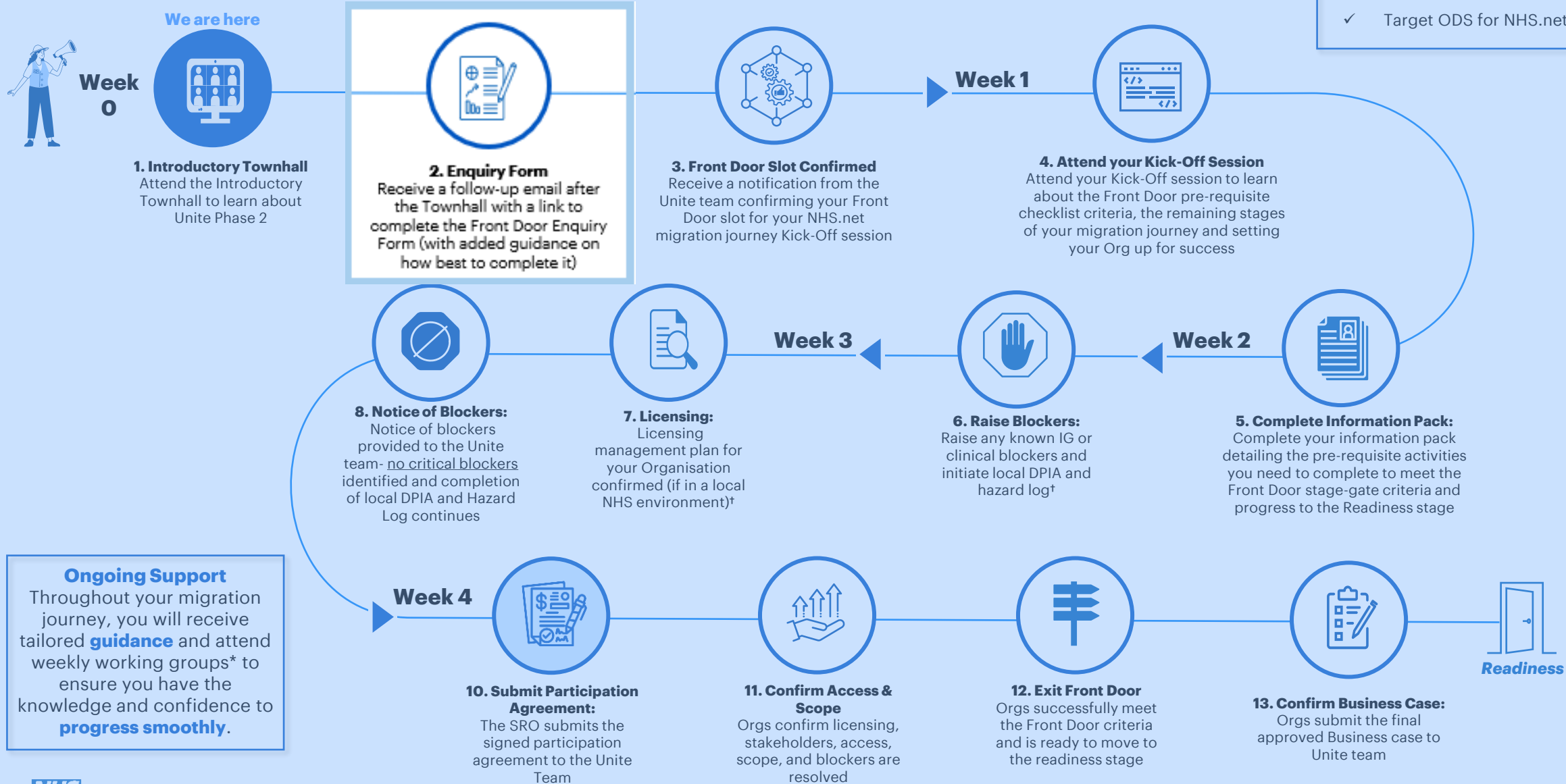


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Front Door Enquiry Form

Your first step in the Unite Migration journey – helping us to plan and prepare your move.



Why it is important?

Completing this form ensures we have all the details needed to support and schedule your migration successfully.

Who should fill out the form?

- The Front Door Enquiry Form **collects key information** from your organisation to plan your migration.
- Each section may require input from different teams or roles, so it is important to **involve the right people** (e.g., IT lead, governance lead, data lead).
- The Unite team **strongly recommends** that the form 'owner' provides their **nhs.net account details**. This is not mandatory however and will not prevent you from submitting the form.
- The Form owner shall be responsible for:
 - Gathering input from relevant colleagues
 - Completing the form accurately and in full
 - Submitting the form on behalf of their organisation

Where can I access the Form?

- The link will be shared via **follow-up email** which you shall receive after the Townhall concludes.
- A link to the Enquiry Form and supporting materials will be available to access via the **Unite Migration site and Viva Engage**.

One form submission will be accepted per Org

What if I don't have an NHS.net account?

- Don't worry; while we recommend creating one **as soon as possible**, this won't prevent you from submitting the form.
- We will provide **guidance on how to create an NHS.net account** in our follow-up email after this session.

What does this form contain?

There are **six sections** covering:

- General Information
- Business Case Details
- Governance (e.g. IG, DPIA)
- Data
- Technical Readiness
- Organisational & Admin Details



- Only **one form submission will be accepted per org**, so ensure that all question responses are reviewed carefully for accuracy
- You can edit your submitted responses until the submission window closes by selecting 'save my response to edit' after submission. Please refer to the guidance

What if I need help?

- Queries may be submitted to the Unite team by completing a separate help form via the Unite Migration site. A link will be provided after the session.

What happens next?

- The Unite team will review your submission.
- You will receive confirmation of your slot and invitation to your Kick-Off session to discuss next steps.



Completing the Front Door Enquiry Form

Helping you complete your first step into the Unite programme – accurately, confidently, and with ease.

The **Front Door Enquiry Form** is the starting point for your organisation's migration.

Completing the form in **accurately and in full** means we can plan your migration smoothly and **avoid delays**.

To keep things simple, we've created **step-by-step guidance** to make it quick, clear and easy to complete.

You'll receive the **additional guidance in our follow-up email** after this webinar, so you can read it in your own time and use it as you complete the form. It will also be available to access via Viva Engage and the Unite Migration site.



Transition to NHS.net

Your Guide to Completing the Front Door Form
Helping you start your Unite Phase 2 journey smoothly

We know forms aren't anyone's favourite task, so we've made this guidance to help you complete the **Front Door form** quickly and confidently. Think of this as your "cheat sheet" so you can gather everything you need in one go.

Before You Begin

You'll need:

- An **NHS.net email address**
- Your **organisation's details** (name, ODS code, user count).
- Some dates and contacts ready (merger plans, licence expiry, project manager name, etc.).
- A quick check with your **migration team** to make sure you have the right information.

Section-by-Section Help

1 General Details

- **Contact Person's Full Name**
 - **What to enter:** Your full name. This person will be the *primary contact* for all communications about the Front Door stage.
 - **Who usually fills this in:** The Unite Project Manager for your organisation, or someone appointed by them.
 - **Why we ask:** So we know exactly who to reach out to if we have questions.
 - **Tip:** Make sure this person is available during the next few weeks to respond to any follow-up queries.

2 Organisation Details

- **Organisation Name**
 - **What to enter:** Your NHS Trust – not abbreviated.
 - **Who to ask:** PMO or Project Manager
- **Number of Users** – Include all active users
 - **What to enter:** Total including all active and inactive users.
 - **Who to ask:** IT Services
 - **Why we ask:** Helps us plan capacity.
- **Is your organisation undergoing any merger or restructuring?**

3 Resourcing

- **Do you have a resourcing plan?**
 - Please confirm if you have a plan, usually including:
 - Senior roles
 - Project Manager
 - Technical roles
 - Commercial roles
 - Training
 - Governance
 - **Who to ask:** Project Manager

4 Licensing

- **Licence Expiry Date**
 - **What to enter:** Licence expiry date.
 - **Requirement:** Licence must be valid at the time of migration.

What to select:

- Yes – if planned, approved, or underway.
- No – if no such changes are expected.

Who to ask: Project Manager, SRO, Executive Office, Programmes/Transformation team.

If Yes: Provide start date.

ODS Code(s) – List all ODS codes (you can only migrate one ODS code).

Current NHS.net Usernames – List all NHS.net usernames you use (SRO, Project Manager, etc.).

Role

- **What to enter:** Your role (e.g. Project Manager, Lead, Technical Lead).
- **Why we ask:** This helps us understand your responsibilities in the programme.
- **Tip:** Ensure your role is the primary contact for the programme.




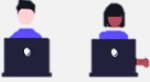


Q3. NHS.net Email Address

- **What to enter:** Your NHS.net email address.
- **Why we ask:** This is used for all communications.
- **If you don't have one:** Please follow the access process.
- **Who to ask:** Your local IT Services team.
- **Tip:** Make sure your email is active before submitting the form.










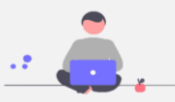

Front Door – Key Roles during this Stage

These are the required team roles that organisations are expected to engage with during the Front Door stage to help ensure smooth progress and timely delivery.

		
<p>Technical Infrastructure Engineer / IT Lead</p>	<p>Project Manager</p>	<p>Senior Responsible Owner (SRO)</p>
<p>Focus Area</p> <ul style="list-style-type: none"> • Data readiness • Endpoint and application compatibility • Migration scope validation <p>Key Responsibilities</p> <ul style="list-style-type: none"> • Engage with Unite technical team • Coordinate with Licence Solution Provider (LSP) to flag capacity risks • Support script execution (migration readiness scripts) • Support technical bolt-on evaluation 	<p>Focus Area</p> <ul style="list-style-type: none"> • Overall programme delivery • Timeline planning • Stakeholder coordination <p>Key Responsibilities</p> <ul style="list-style-type: none"> • Lead internal engagement with LSP and Customer Success Manager (CSM) early • Align migration timelines with org-level activities • Coordinate script testing and data return with tech team • Confirm bolt-on needs (tech + ops) and coordinate survey response 	<p>Focus Area</p> <ul style="list-style-type: none"> • Strategic Alignment • Risk Oversight <p>Key Responsibilities</p> <ul style="list-style-type: none"> • Approval of Unite Migrate team's Participation Agreement • Sponsor the migration and act as escalation for org-side RAID
		
<p>Change Leads / Change Managers</p>	<p>Risk, Governance, & Information Governance (IG) Lead</p>	<p>Primary Local Administrator (PLA)/Local Administrator (LA)</p>
<p>Focus Areas</p> <ul style="list-style-type: none"> • Stakeholder alignment • Adoption risk monitoring • Change readiness <p>Key Responsibilities</p> <ul style="list-style-type: none"> • Stakeholder management and readiness across departments • Coordinates user adoption and change activities 	<p>Focus Area</p> <ul style="list-style-type: none"> • Data Protection Information Agreement (DPIA) • Clinical hazard review • Information security & compliance <p>Key Responsibilities</p> <ul style="list-style-type: none"> • Complete the DPIA using the NHSE template • Review & update Distribution Lists (DLs) & Shared Mailbox (SMB) • Review & support update of External SP links • Weekly Clinical Hazard Review Meetings are attended and accurate log recording 	<p>Focus Area</p> <ul style="list-style-type: none"> • System admin. and operational readiness <p>Key Responsibilities</p> <ul style="list-style-type: none"> • Audit external-facing DLs, SMBs, SP links • Run bot for existing NHS.net accounts • Validate Organisation Data Service (ODS) code mapping • Support completion of the Information Pack with local environment details

Key Roles Throughout Migration Journey

Throughout your journey, the roles below are recommended to support progress. They don't all need to be in place at once- some may be part-time, temporary, or combined within a single team member.


				
<p>Business Analyst</p>	<p>Service Desk Manager / Support Lead</p>	<p>Training Lead/Trainer</p>	<p>Floorwalkers</p>	<p>Command Centre Team</p>
<p>Focus Area</p> <ul style="list-style-type: none"> Requirements gathering & validation System dependency mapping <p>Key Responsibilities</p> <ul style="list-style-type: none"> Requirement gathering, process mapping, and issue triaging 	<p>Focus Area</p> <ul style="list-style-type: none"> Incident handling User support Escalation process during cutover <p>Key Responsibilities</p> <ul style="list-style-type: none"> Confirm understanding of standard support hours Plan for high-volume support post-switchover; assess existing capacity 	<p>Focus Area</p> <ul style="list-style-type: none"> User readiness assurance Training effectiveness tracking Champion enablement <p>Key Responsibilities</p> <ul style="list-style-type: none"> Help onboard and coach Change Champions Create accessible training materials (videos, webinars, tip sheets) 	<p>Focus Area</p> <ul style="list-style-type: none"> Onsite issue triage End-user guidance Escalation Support <p>Key Responsibilities</p> <ul style="list-style-type: none"> Positioned across Trust sites during switchover weekend Provide immediate support to users on the ground Managing high call volumes and in-person queries 	<p>Focus Area</p> <ul style="list-style-type: none"> Incident coordination Risk escalation Response tracking <p>Key Responsibilities</p> <ul style="list-style-type: none"> Manage coordination of support teams and floorwalkers Central point of escalation during go-live Daily standups and status reporting
				
<p>Data Analyst</p>	<p>Change Champions/First Adopters</p>	<p>Office365/ Exchange Engineer</p>	<p>Change & Communications Lead</p>	
<p>Focus Area</p> <ul style="list-style-type: none"> Data Analysis Impact Analysis <p>Key Responsibilities</p> <ul style="list-style-type: none"> Supporting the master file and analysing the data User mapping, validating migration accuracy, and resolving data mismatches 	<p>Focus Area</p> <ul style="list-style-type: none"> User Advocacy Early Experience Feedback <p>Key Responsibilities</p> <ul style="list-style-type: none"> Encourage colleagues to switch to using NHS.net mailboxes, adopt Teams collaboration, and report issues constructively 	<p>Focus Area</p> <ul style="list-style-type: none"> Data Discovery Inventory Management <p>Key Responsibilities</p> <ul style="list-style-type: none"> Execute and validate data volume scripts Uncover hidden Teams data Ensure storage thresholds are flagged early; advise on migration sequencing SharePoint (SP) vs Teams performance 	<p>Focus Area</p> <ul style="list-style-type: none"> Communications Training & awareness User journey experience <p>Key Responsibilities</p> <ul style="list-style-type: none"> Identify organisational support gaps Engage frontline and support staff to test understanding of the migration journey 	

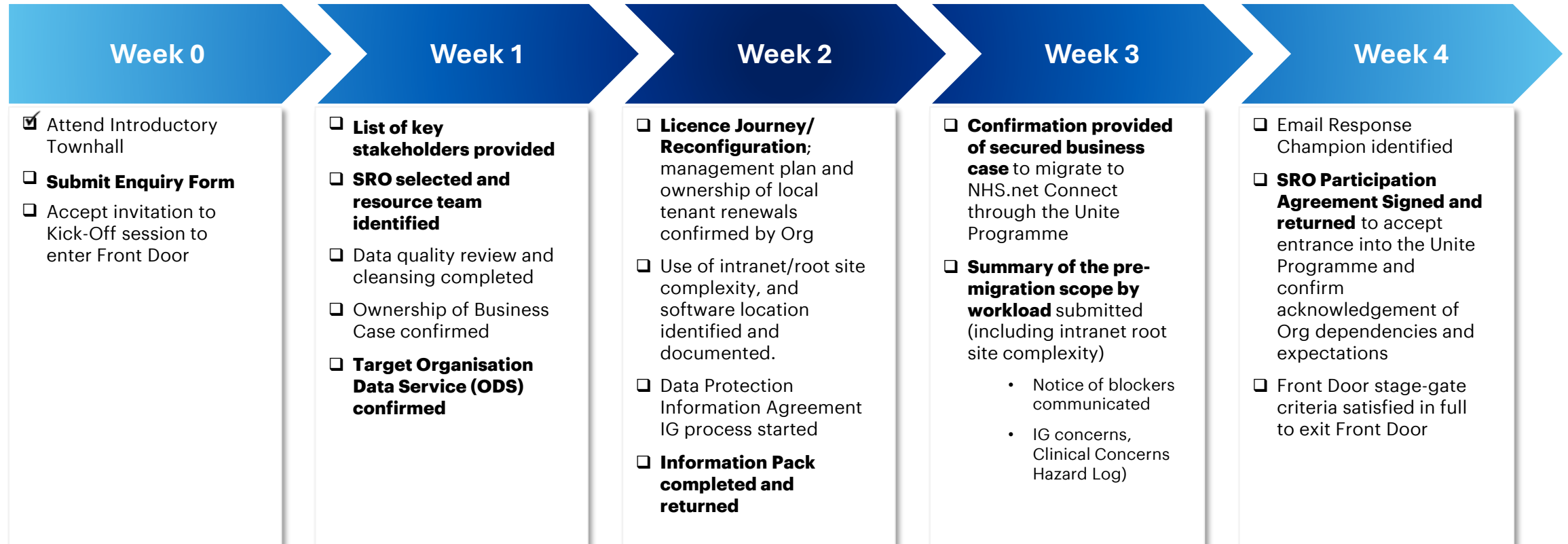
Front Door Checklist for Organisations to Complete

Complete the following activities to meet Front Door exit criteria and progress into the Readiness stage



Once your slot is confirmed, you'll be invited to a Front Door Kick-Off Session and provided with a checklist of activities to complete to progress through the Front Door and into Readiness.*

 Tasks displayed in **bold** are mandatory and must be **completed within, or ahead of the specified week**



Q&A



Appendix



What's not part of your migration?

Here's a clear view to help you plan: what's outside the Standard Unite transition, and what stays with your local setup



Your Local Client Responsibilities

While NHS.net Connect offers an optional Intune solution, you shall remain responsible for managing your own devices. During the transition, we may ask you to support with activities such as:

- Installing local client applications (for example Microsoft 365 Apps for Enterprise like OneDrive, Teams, etc.)
- Repointing OneNote
- Adjusting your browser settings
- Fixing plug-ins or mail extensions
- Providing end-user device support, troubleshooting, and endpoint setup



Your role in Communications and Support

Communication is a vital part of the transition. Your org shall manage its own communication plan and share updates with users. We shall provide support by offering templates, along with some predefined channels and messages. However, we shall not deliver:

- Direct communications, training, or webinars to end-user audiences.
- Floorwalking, kiosks, or other on-site support.
- Bespoke tailoring of templates or communications materials.



Your Assurance Responsibilities

We'll provide you with a clear NHS.net Connect pathway and plenty of support, but we won't replace your own local responsibilities. You'll still need to manage your existing policies and procedures, such as:

- Building your business case and securing funding
- Putting in place internal legal and governance controls (e.g. completing a DPIA)
- Making sure you comply with the DCB0160 clinical risk management standard
- Handling procurement, renewals, or licence terminations through your LSP
- Overseeing your own programme or project governance (we can't attend these)
- Managing later termination and decommissioning of your old tenants or infrastructure

As you move through the transition, we'll use the **Front Door** and **Readiness** stages to share more details and guide you through what's required.



NHS
England

accenture

We recognise that some of you may benefit from additional paid-for migration services for certain [NHS.net](#) Connect items. These shall be optional and not a pre-requisite for cutover. Further information shall be shared in due course.



Recommendations & Lessons Learned

Additional advice and considerations for your migration approaches.



Data and User Volumes

- **Private Data Volumes:** Private Teams and SharePoint data volumes should be disclosed in full to ensure **accurate migration scoping**.
- **Management of Sensitive Data:** Ensuring sensitive data is appropriately **secured** with support from **IG and clinical safety colleagues** will be critical to **protect your data** and information, with particular focus on data not secured by root level **SharePoint permissions**.
- **Data Capture:** Using our new template to capture a **full-view of the latest data** with breakdowns provided per **data type** (Teams, SharePoint, Mailboxes etc.) will ensure accurate data migration.



Navigating Organisation Complexity

- **Pipeline Management:** Scheduling a pipeline of Orgs to **prioritise** and **balance migration workloads** are important to ensure an **optimal** migration speed.
- **Confirmation of Priorities and Resourcing:** Up-front verification of an Org's **capacity** to support the migration project with **appropriate resourcing, and without competing priorities is essential** to progress through each stage.
- **Migration Planning:** Scheduling of a **planned migration** date, to **minimise impact** on BAU operations, and **commitment** to this date.



Licence Journey and Reconfiguration

- **Licence Timeline Planning:** Early engagement with your **Licence Solution Provider** and **Customer Success Manager** for **licence journey planning** and timing of an **extension** as appropriate will help to avoid preventable delays.
- **Identifying Licence Users:** Identification of **non-mail licenced users** (e.g. Teams-only) should be disclosed by Orgs to ensure migration data is scoped appropriately .
- **Licence Source Analysis:** Thorough **licence source analysis** should be conducted to ensure **appropriate policy reconfigurations** on NHS.net.



Root Site and Intranet Complexity

- **SharePoint complexity:** An investigation of **SharePoint** root site **complexity** should be conducted, including integrations and hub sites.
- **Intranet Complexity:** Early **planning** should be prioritised for **higher complexity** intranet sites which require additional support.
- **SharePoint and Intranet Integrations:** **External providers** should be investigated to identify **suitability of existing local integrations** with NHS.net.