



## Briefing: Smartcard Role and Activity codes, and how to update them

This Community Pharmacy England Briefing explains for community pharmacy Smartcard users/administrators, Local Pharmaceutical Committees, system suppliers and local Smartcard Registration Authorities (RAs) about Smartcard Role and Activity codes and how these get updated.

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### Introduction

The Smartcard [model](#) sets out that [Local Registration Authorities \(RAs\)](#) prepare or update Smartcards for pharmacy team members by applying (or 'linking') to each [Smartcard pharmacy working 'Role'](#) (e.g. Roles to enable ability to change EPS nomination, downloading and claiming of EPS prescriptions, and access by professionals of the [National Care Records Service \(NCRS\)](#)). RAs may apply positions / pharmacy working 'Role' codes and 'Activity' codes onto pharmacy team members' Smartcards.

RAs also apply [pharmacy organisation ODS codes](#) associated with pharmacy premises.<sup>1</sup>

Requests to update cards may be made by the Smartcard holder to the RA. Other staff at the pharmacy or head office may also make or support the request and the RA's necessary identity verification work.

Some pharmacy teams have people within the pharmacy that hold Smartcard Administrator/Sponsor rights. Those with administrative rights can better [use the Smartcard Care Identity Service \(CIS\) system](#) to speed up working through Smartcard processes. Pharmacy Smartcard Administrator/Sponsors may work with RAs on behalf of other team members.

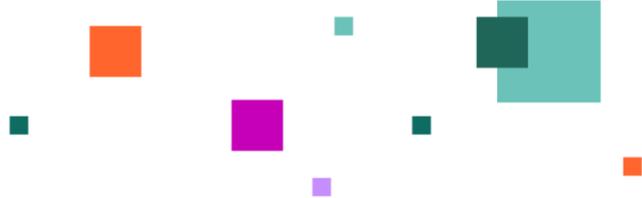
### Main Smartcard codes

Pharmacy team members won't require detailed knowledge about Smartcard codes in order to have the codes they need set-up on their Smartcards by the RA. Smartcard administrators/sponsors may discuss Smartcards codes with RAs when working with RAs to update pharmacy team members' Smartcards.

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<sup>1</sup> Each pharmacy premises has its own unique ODS code. Multiple ODS codes can be linked onto Smartcards for those staff that work at more than one site. See also: [Community Pharmacy England Briefing: Updating Smartcards for multi-site and NCRS usage](#) to read more about NCRS, SCR and multi-site Smartcard arrangements.

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Most pharmacy team members' Smartcards set-up later should be associated with one of two main Smartcard Role codes:

Main Smartcard Role codes	Pharmacy team member often given Smartcard Role code	Smartcard Activity code typically associated may include
'R8003 Health Professional'	Pharmacists	Includes Activity 'B' codes B0825, B0401 within its baseline & more
'R8008 Admin/Clinical'	Counter assistants, dispensers, and pharmacy technicians	Various

Some legacy positions may also have been set-up with R8004 Healthcare Student. Staff members in training and therefore performing in every aspect of the job under relevant supervision need a code-set matching up with the role they are training in.

Smartcards are associated with both Role codes as well as Activity codes. Many codes relate to the key EPS-related pharmacy work:

Pharmacy EPS work	Notes about those Smartcard codes associated with the EPS work
<b>EPS Nomination setting</b>	Requires Activity code B0825. The Role code R8003 usually includes the ability to set nomination.
<b>Viewing medicines</b>	Requires Activity code B0401. The Role code R8003 usually includes the ability to set nomination.
<b>EPS pharmacy activities (standard)</b>	Activity code B0570 code provides the ability to download, and send dispense messages. Some pharmacy patient medication record (PMR) EPS systems <b>may enable claim messages</b> to be sent with presence of this Activity code B0570, e.g. because of requests from their pharmacy customers.
<b>EPS pharmacy activities (advanced)</b>	Activity code B0572 code provides all of abilities of B0570 plus more. Some (but not all) PMR systems may only allow <b>sending of claim messages</b> if this code is present on the Smartcard. If B0572 is present on a card, there is no need for B0570 to also be applied, however some Smartcards may still have both B0572 and B0570 present.

## Premises codes

[The pharmacy organisation ODS codes](#) where the person will work. Each pharmacy premises has its own unique ODS code. Multiple ODS codes can be linked onto Smartcards for those staff that work at



more than one site. Additionally, there is a multi-site generic '5F' ODS code which can also enable working at multi sites.

The 5F multi-site code may also be applied to cards enabling for staff members' cards to work at other pharmacy premises systems should they need to work at other pharmacies.



## Recommended pharmacy positions

RAs may use new pharmacy positions (prepared for use from early 2024) in line with the below:

Position name	Position description	Opened in	Role code	Access profile activity codes
<b>National Qualified Pharmacist (Multi-Site)</b>	For Qualified Pharmacists working within Community Pharmacy to allow access of relevant health records. Note - DO NOT AMEND unless authorised by NHS England.	2023	R8003	B0068 - Verify Prescription B0572 - Manage Pharmacy Activities B0257 - View non-ETP Clinical Data within CSA B0264 - Access SCR Application (Perform Patient Trace) <b>B0168 - View SCR when permission could not be requested</b>
<b>National Trainee Pharmacist (Multi-site)</b>	For Pre-Registration Pharmacists in Community Pharmacy. Position must be time limited & updated to National Qualified National Qualified Pharmacist (Multi-Site) after training is completed. Note - DO NOT Amend	2023	R8003	As per National Qualified Pharmacist (Multi-Site)
<b>National Qualified Pharmacy Technician (Multi-Site)</b>	For Qualified Technicians working within Community Pharmacy to allow access of relevant health records. Note - DO NOT AMEND unless authorised by NHS England.	2023	R8008	B0401 - View Patient Medication B0825 - Manage Patient Demographics B0572 - Manage Pharmacy Activities B0085 - Claim a relationship with a patient B0168 - View SCR when permission could not be requested B0264 - Access SCR Application (Perform Patient Trace) B0257 - View non-ETP Clinical Data within CSA



<b>National Trainee Pharmacy Technician (Multi-site)</b>	For Trainee Technicians working within Community Pharmacy to allow access of relevant health records. Note - DO NOT AMEND unless authorised by NHS England.	2023	R8008	As per National Qualified Pharmacy Technician (Multi-Site)
<b>National Pharmacy Team Member (Qualified or Trainee) (Multi-Site)</b>	For Dispensers and Counter Assistants working in Community Pharmacy. Pharmacy professionals on the GPhC register should be assigned to - National Qualified Pharmacy Professional (Multi-Site). Note - DO NOT Amend	2023	R8008	BO068 - Verify Prescriptions BO401 - View Patient Medication BO825 - Manage Patient Demographics BO572 - Manage Pharmacy Activities

RA setting up positions for new members of pharmacy staff relating to a premises code may also consider whether to align with this code-set i.e.:

- National Qualified Pharmacist (premises ODS code specific)
- National Trainee Pharmacist (premises ODS code specific)
- National Qualified Pharmacy Technician (premises ODS code specific)
- National Trainee Pharmacy Technician (premises ODS code specific)
- National Pharmacy Team Member (Qualified or Trainee) (premises ODS code specific)

Notes: Community Pharmacy England recommends every pharmacy technician (regulated by GPhC) has gained access to SCR (see [SCR checklist](#)).



## RA legacy positions

Smartcard users may also hold some legacy positions

Position name	Position description	Opened on	RBAC Role Code	RBAC Activity Codes (typical)	Successor Position
National Locum Pharmacist	Community Locum Short Term Pharmacist Access (R8003 + B0572 + B0068) DO NOT AMEND unless authorised by HSCIC.	23-Apr-10	R8003	B0068,B0572	National Qualified Pharmacist (Multi-Site)
National Locum Pharmacist - Covid19	Community Locum Short Term Pharmacist Access (R8003 + B0572 + B0068) DO NOT AMEND unless authorised by HSCIC.	29-Sep-20	R8003	B0068,B0572	National Qualified Pharmacist (Multi-Site)
National Locum Pharmacist + SCR	Community Locum Short Term Pharmacist Access with SCR (R8003 + B0572 + B0068 + B0264 + B0257) DO NOT AMEND unless authorised by HSCIC.	03-Mar-16	R8003	B0068,B0572,B0257,B0264,	National Qualified Pharmacist (Multi-Site)
National Locum Pharmacist + SCR - Covid19	Community Locum Short Term Pharmacist Access with SCR (R8003 + B0572 + B0068 + B0264 + B0257) To support healthcare arrangements for Covid19. DO NOT AMEND unless authorised by NHS Digital.	31-Mar-20	R8003	B0068,B0572,B0257,B0264	National Qualified Pharmacist (Multi-Site)



National Pharmacy Dispenser	Locum Pharmacy Dispenser – Also known as Medicine Counter Assistant – (R8008 + B0570 + B0401 + B0825) DO NOT AMEND unless authorised by HSCIC.	29-Mar-16	R8008	B0401,B0570,B0825	National Pharmacy Team Member (Qualified or Trainee) (Multi-Site)
National Pharmacy Technician	Locum (Qualified) Pharmacy Technician Access (R8008 + B0572 + B0401 + B0825) DO NOT AMEND unless authorised by HSCIC.	03-Mar-16	R8008	B0401,B0572,B0825	National Qualified Pharmacy Technician (Multi-Site)
National Pharmacy Technician + SCR	Locum (Qualified) Pharmacy Technician with SCR Access (R8008 + B0572 + B0401 + B0264 + B0825 + B0085 + B168 + B0257) DO NOT AMEND unless authorised by HSCIC.	03-Mar-16	R8008	B0401,B0572,B0825,B0085,B0168,B0257,B0264	National Qualified Pharmacy Technician (Multi-Site)
National Pharmacy Technician + SCR – Covid19	Locum (Qualified) Pharmacy Technician with SCR Access (R8008 + B0572 + B0401 + B0264 + B0825 + B0085 + B168 + B0257). To support healthcare arrangements for Covid19. DO NOT AMEND unless authorised by NHS Digital.	31-Mar-20	R8008	B0401,B0572,B0825,B0085,B0168,B0257,B0264	National Qualified Pharmacy Technician (Multi-Site)

Notes:

- During late April 2020 cards with 5F had the 5F associated with the SCR code. Community Pharmacy England and Community Pharmacy IT Group feedback is that the initiative would be helpful if extended past the pandemic. Community Pharmacy England and NHS England prepared a successor plan – newly created pharmacy roles. Additionally the community pharmacy workforce has become more mobile (particularly pharmacists needing to work at multi premises) compared with the workforce mobility in years past.



## Recommended advanced pharmacy positions

RA 'Pharmacy Position' templates (advanced)	Smartcard codes usually associated	Notes
<b>Pharmacy Smartcard sponsor</b>	Pharmacy Managers, Pharmacists, or any other staff may be provided with the Pharmacy 'B1300 Sponsor' if criteria is met (e.g. Smartcard Sponsor training is completed and the RA is willing to grant the rights) and this may be linked only to those ODS codes at which the person works.	This person may be able to add or remove or request Pharmacy Positions which have been set-up within the RA area. The RA can create Pharmacy Positions in line with the table above. This person may be able to unlock Smartcards, assist with renewal, and make requests to the RA for their colleagues.
<b>Pharmacy Local Smartcard Administrator unlocker</b>	<b>Code 'B0263'</b> allows the user to unlock Smartcards of users belonging to the organisation	May allow the user to unlock Smartcards of users belonging to the organisation'. as well as assist with Smartcard certificate renewal but cannot renew an expired card.
<b>Pharmacy ID checker</b>	<b>Code: 'B0267 Approve RA Requests' (Registration Only)</b>	The person has powers to check ID and take photos and send these to the RA to assist with the RA process.
<b>Pharmacy SCR Governance Person</b>	Add onto existing Roles/Activities these three:  <b>Codes:</b> (a) 'R0001 Privacy Officer', (b) 'B0016 Receive Self Claimed LR Alerts'; and (c) 'B0015 Receive Emergency View Alerts'.	A person for each pharmacy will be able to view alerts about SCR accesses, and take action to investigate only where needed. Read more at <a href="https://cpe.org.uk/sgp">cpe.org.uk/sgp</a> .



At present, pharmacy Smartcard users cannot themselves check the exact Activity codes on their card but they can check their Pharmacy Positions using the [Checking my Smartcard profile using Care Identity Service guide](#). Some RAs may provide reports to their users about the set-up and codes relating to their cards. Pharmacy staff wishing to check their own Activity codes, may request information from their RA. In the event of difficulties, pharmacies can refer to the [Smartcard escalation process guide](#), and this codes briefing and/or the escalation guide can be shared with local RAs by email if required.

Community Pharmacy England worked with the central NHS England SCR and EPS teams and others on this guidance, and thanks them for their invaluable inputs and ongoing work to streamline CIS related processes for health care staff and RA organisations.



## End dates

Two end dates relating to your care identity profile relate to:

1. **Smartcard certificate renewals** – these occur once each three years (the renewal period was expanded from two to three years during 2023).
2. **Position end dates:** From April 2024, it is recommended that when Registration Authorities grant any further new pharmacy positions including positions with 5F, they do so for a maximum of three years. This reduces the clinical risk of pharmacy team members later unexpectedly losing the ability to carry out tasks such as EPS prescription download (and for pharmacy professionals use of records). Each position on a Smartcard can have its own position end date. Past positions may have been granted for varying time periods. The decision was taken to recommend that RAs grant positions for a maximum three years to enable a more consistent process for RAs and health care staff.

**Method for checking your position end dates:** All smartcard users have the ability to view their Position Assignments including end dates on their CIS profile by logging into the Care Identity Service application. An example screenshot below of what this looks like:

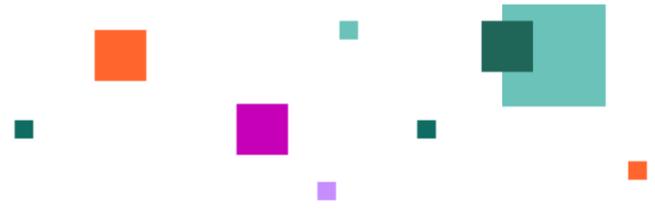
Position code	Position name	Source	Org code	Start date	End date	Last modified
123456	FXX12 Pharmacist professional	CareID	FXX12	01/03/2020	01/03/2025	01/03/2020
654321	Multi-site pharmacist	CareID	FFFFF	01/12/2022	01/12/2027	01/12/2022
159264	FZZ34 Pharmacist professional	CareID	FZZ34	01/06/2018	01/06/2023	01/06/2018

RAs are recommended to notify Smartcard users about position end dates, as the Smartcards are issued and just before the position end dates expire (in the event that automatic notifications are not issued). Smartcard users are also encouraged to diarise for position end dates to support these being renewed.

## Frequently asked questions

### Q. Can I assign any staff member to send EPS claim messages?

It is the pharmacy owner's decision whether any member of the pharmacy team can send EPS claim messages to NHSBSA. The 'RA Pharmacy Positions templates' table above indicates how any member of the pharmacy team including pre-registration pharmacists may be granted Smartcard rights that enable EPS message claiming. Pre-registration pharmacists and other trainee pharmacy staff need to



train on all aspects of the pharmacy work. The pharmacy owner may delegate to others the decisions as to which staff have which Smartcard rights e.g. the pharmacist and/or the pharmacy manager. The team itself may also discuss which staff perform which EPS activities.

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## Further resources

Read more at: [psnc.org.uk/smartcards](https://psnc.org.uk/smartcards), [Community Pharmacy England Briefing: Updating Smartcards for multi-site and Summary Care Record \(SCR\) usage](#) and within one-pager Community Pharmacy England IT factsheets: [Smartcard processes and tips](#), [Using Care Identity Service \(CIS\)](#), [Smartcard model overview](#), [Smartcard escalation process](#) and [SCR checklist](#). If you have queries on this Community Pharmacy England Briefing, please contact [Daniel Ah-Thion, Community Pharmacy IT Policy Manager](#) or [it@psnc.org.uk](mailto:it@psnc.org.uk).



## Appendix: Process flow for new staff to arrange care identity profile

Proposed post-pandemic process that may apply from April 1st 2024

Updated Jan 2024

