



# Referral Agency Guide to E-referral



## Introduction

Thank you for adopting “e-referral” as a way to refer your clients to Ribble Valley foodbank for emergency food assistance. Without the help provided by agencies like yours, Ribble Valley foodbank would be unable to help people in need in our local community.

We believe that e-referral will help more of your clients receive the help they need, at the time they need it most; and will make referral easier for your staff.

### What is e-referral?

As an existing referral agency, you already hold printed red vouchers, which your staff fill in and give to a client to take to the foodbank.

E-referral is a way to refer a client without the need for a pre-printed red voucher. It uses a bespoke data system shared by all foodbanks in the Trussell Trust network, and can work in two ways:

1. Printed e-referral vouchers

The client’s details are captured into a computer (or other connected device) and a personalised voucher is printed for them to take to the foodbank.

2. “Code-only” referrals

The client is not given a voucher, but just a voucher code to take to the foodbank.

However, it must be noted that not all foodbank centres can accept “code only” referrals, and this may restrict where a “code only” client can visit.

Ribble Valley foodbank is able to accept “code only” referrals at both of its foodbank centres. We would therefore encourage you to use code only referrals.

### Why use e-referral?

Using e-referral doesn’t stop you from using red vouchers. You can use both, if that helps you. However, there are multiple benefits from using e-referral, such as:

- Your staff will not need to carry red vouchers, nor need to re-order them.
- Your staff will be able to see the client’s history of foodbank referrals. They will be able to see if the client has not used previous vouchers, which might mean they need help to visit the foodbank. They will also see if the client has been getting vouchers from other agencies, in case you need to take that into account.
- Staff will be able to see the foodbank centres nearest to the client’s postcode and their opening times. These will be printed with the personalised voucher, or given verbally for “code only” referrals. This should help clients get to the foodbank centre most accessible to them.
- Clients can be given a “code only” referral over the phone if they are supported remotely, or after a worker has returned from a visit (always conditional upon local foodbank centres being able to accept “code only” referrals).
- You will be able to see which of your staff are making referrals.
- The client details you enter into the system will be immediately accessible to the foodbank when the client visits. This will improve our ability to help your clients, and will reduce the errors that arise when transcribing entries from hand-written vouchers.

## Your responsibility

Your principal responsibility remains to make sound judgements about your clients' need for emergency food. We rely upon your judgement, and trust you either because the situations of your clients are well known to you, or because your staff are skilled in assessing the needs of members of the public and determining how best they may be helped.

We ask you to be alert to potential abuse, particularly where a client appears to be getting vouchers from multiple sources, or multiple vouchers in a short period (though there can be circumstances where this is justifiable).

When using the e-referral system, your staff will have ready access to our phone number and email, and we welcome them contacting us if they have any uncertainties.

## Signing up for e-referral

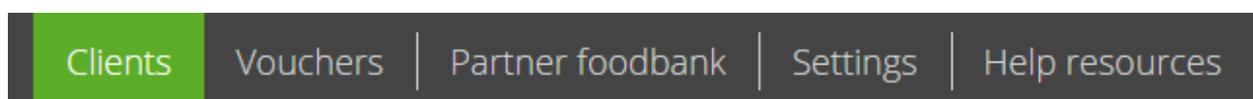
### Responding to the invitation

E-referral is not automatically available to all referral agencies, but only to those invited to use it. The invitation will come to you as an email with a link labelled "Accept invitation". By clicking on the link, you indicate that you wish to use e-referral as well as, or instead of, red vouchers. You will be given opportunity to set your password, which you will need to retain along with your log-in identity.

### Accessing the data system

The foodbank client data system is accessed on-line via <https://data.foodbank.org.uk>. On arrival in the system, you will be asked to enter your username and password.

Once you are in the data system, you will see a menu bar with five main options:

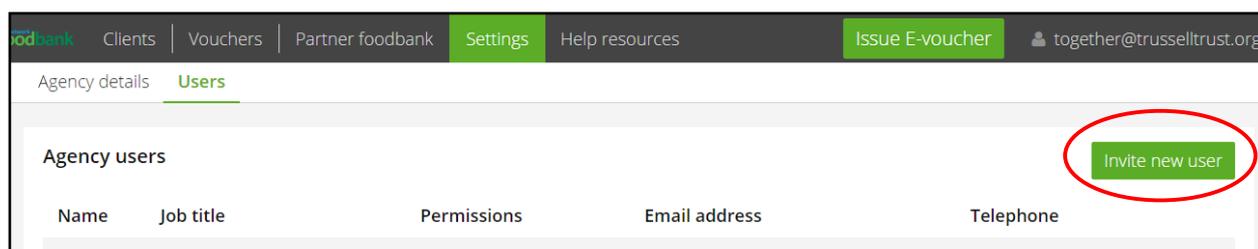


To prepare for use of the system, you will first need to visit **Settings** and carry out two tasks:

1. Check your **Agency details** are correct.  
If your details change in the future, please edit them here. The foodbank will then always have your latest contact details. (In the same way, the latest contact details for the foodbank will always be available to you via the **Partner foodbank** screen).
2. Click **Users** to give staff access to e-referral:

### Adding Users

You will need to add into the system the details of staff that you want to have access to e-referral. To do so, click on the **Invite new user** button.



You will be asked for the following details of the new user: their name, job title, a unique email address, phone number (optional), whether they are a “user” or “manager” and whether they have signed a data protection statement. Managers have the ability to add, edit and remove users, and amend the “agency details”, as well as all the other functions available to all Users.

Once you have entered a user’s details, click the **Send invitation** button. The user will then receive an email similar to the one that invited you to e-referral.

### **E-referral to other local foodbanks**

Your agency may have a footprint that touches on other foodbanks. We suggest that you let them know that you will be starting to use e-referral, and check that they are happy to receive clients with printed e-referral vouchers (the system will automatically show if their foodbank centres are able to receive “code only” clients).

### **Stopping e-referral**

If at any point it looks like e-referral isn’t working for you, please let us know. We can turn off your access to it.

To remove access for one of your staff, just go to **Settings/Users**, find their name, click **Edit details**, and click **Delete** and the bottom of the screen.

## **Additional items**

### **Reporting problems**

Please contact Ribble Valley foodbank if you are unsure about when and how to make e-referrals. We are always very happy to discuss this with you. Please also contact us if you find a technical problem in the system. We will report it for you.

### **Data security**

Like all foodbanks in the Trussell Trust network, Ribble Valley foodbank takes data security seriously. Ribble Valley foodbank is registered with the Information Commissioners Office, and requires all its data system users to sign up to standards that protect client personal data. All foodbank personnel are also required to sign a confidentiality agreement.

It is important that your agency adopts equivalent standards and rules of behaviour and confidentiality. User of the data system with “manager” status can indicate that a user has signed a data statement. This can be found by visiting “Settings”/”Users”, and then clicking “Edit details”. Access to the data system will be restricted only to users who are recorded in the system as having signed a “data statement”.

Client data in the system is fully encrypted, both when stored and when being communicated across the internet.

In order to prevent abuse of the system, you will see the dates of all the foodbank vouchers issued to your clients, not just those issued by you. This visibility of voucher history means that you can be confident that a client is not “doing the rounds” to get multiple vouchers. You will also see if other people from your client’s postcode have been getting vouchers, since different members of the same household sometimes try to get vouchers separately.

To make clients aware of this, printed vouchers contain the following statement:

*“To help prevent misuse, the date and location of client’s foodbank visits may be visible to other foodbanks and some referral agencies”.*

## Making referrals

If you want to, you can continue to hold pre-printed blank red vouchers. These may still be useful to you if you have staff without internet access when in direct contact with clients.

Otherwise, to make an e-referral, log into the data system and click on the **Issue e-voucher** button. This starts a six-step process:

### 1. Step 1: Search for client

Voucher search E-voucher list **Issue E-voucher**

1 Search for client — 2 Client details — 3 Voucher information — 4 Choose foodbank centre — 5 Preview voucher — 6 Confirmation & print

### Step 1 of 6: search for client

**Search for clients across Trussell Trust Network**

Enter at least a surname and first part of the postcode or select as having no fixed address/sensitive address. Please note only the V5 of the system will be searchable here.

First name

Surname

Address  Postcode

No fixed address/sensitive address

[Clear](#) [Search](#)

staging.data.foodbank.org.uk/vouchers

Enter the client’s details and click **Search** to see if they are already in the system. You will need to enter at least their surname and at least the first part of their postcode. Any matches will then be displayed.

Results found for surname "Brown" on "SP2"

If you cannot identify the correct client please [create new client record](#).

| Name      | Postcode | Last voucher issued | Last voucher fulfilled | Vouchers issued in last 6 months | Fuel bank vouchers given in last 6 months |                                |
|-----------|----------|---------------------|------------------------|----------------------------------|---|--------------------------------|
| bob brown | SP2 7HL  | 21/08/16            | 01/09/16               | 2                                | 0   | <a href="#">Expand details</a> |

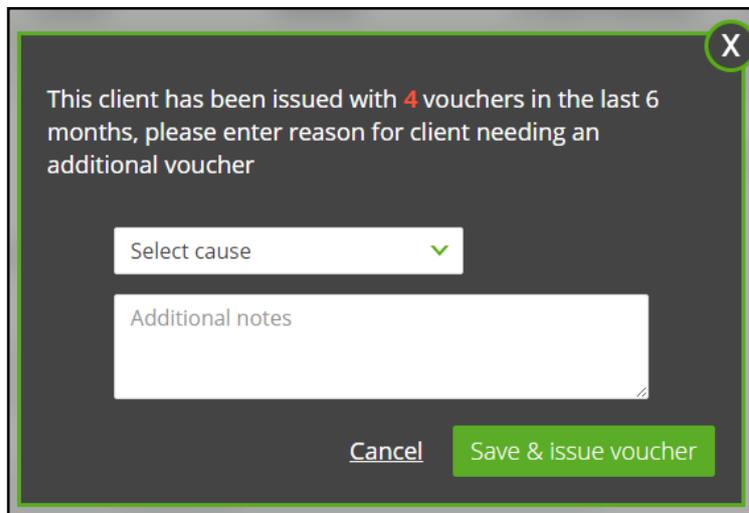
If the correct client is not listed, click on **create new client record**. You will be taken to *Step 2: Client details*.

If the correct client is listed, click on **Expand details**. You will see the history of foodbank vouchers for this client, and for anyone else at the same postcode (unless the location has been flagged as a “sensitive address”, such as a women’s refuge).

If the voucher history raises no concerns, click on **Issue voucher**. You will be taken to *Step 2*, with the known “client details” will already be displayed. You will be able to amend these details if you need to, or go straight to *Step 3: Voucher information*.

### Issuing more than 3 vouchers

At this point, you will be alerted if the client has already had more than 3 vouchers in the last 6 months.



This message does not stop you issuing another voucher; but there should be good reason to do so. This usually is because the client's crisis is genuinely continuing, while available steps are being taken to resolve the crisis. It could also be because the client has been hit by a new crisis.

Best practice is to contact the foodbank before issuing more vouchers. However, if you are confident that the client needs a further voucher, you can record the reason here. You may be able to find a suitable reason in the drop-down list, or you may simply type a note. This will be visible to the foodbank when the voucher is processed. We may wish to get in touch to discuss the clients' continuing needs, and will sometimes need to put a limit on the number of vouchers a client can have.

### Clients with unfulfilled vouchers

Sometimes a client will not use a voucher, and it remains "unfulfilled". As a result, they may well have been issued more than three vouchers, but not used all of them. There are several possible reasons for this:

- embarrassment: the client is reluctant to visit the foodbank
- unable to travel: the client was ill or lacked necessary transport
- problem relieved: the voucher was not needed, as alternative help became available
- "timed out": the client delayed, and assumed the voucher had become invalid
- "insurance" : the client is holding a voucher against a future time of need
- lost voucher
- stockpiling multiple vouchers

It is worth asking the client about unfulfilled vouchers. If the client's explanation seems reasonable, your staff should feel comfortable issuing an extra voucher.

However, a new voucher should not be issued if the client has had other vouchers in the last couple of days. The food provided by the foodbank should last three days at least. A client should not need a second vouchers within three days, other than in exceptional circumstances (for example, if a bank-holiday weekend meant that the client would not get essential foodbank help for an extended period).

## Step 2: Client details

At this stage, record the main information about the client:

- First name
- Surname
- Whether the client has no fixed abode, or a sensitive address
- Details of the address
- Postcode (required)
- Year of birth (optional, but helpful to analyse patterns of need)
- Ethnicity (optional, but helpful to demonstrate cross-cultural balance)
- Number of adults and children in the household

These details will be retained for any future referrals. If they change in the future, they can always be amended, either as a temporary change (for example, if children come to stay for a while) or a lasting change.

## 2. Step 3: Voucher information

This is the main stage in the referral process, where you record details about this particular referral. It consists of two parts.

The first part is “Referral agency information”. This displays your agency name, contact number and the name of the staff member making the referral. The staff name and contact number can be amended, if necessary. This information will be visible to the foodbank, and will help them if they have a query or need to speak to the referrer.

Referral agency information

Agency name  
STAGING agency

Contact telephone  
This is needed in case a foodbank has an inquiry about the voucher

Person who issued voucher

The second part deals with “Client circumstances”. It records six important pieces of information about the client. This information will help the foodbank understand the client’s situation, and so be better able to help them. It will also provide valuable insights into patterns and trends lying behind demand for foodbank assistance.

### i. *Can the client provide ID when collecting food at the foodbank?*

E-referral is potentially less secure than pre-printed red vouchers. It is therefore preferred if clients can bring ID when visiting the foodbank with a printed e-referral voucher. Clients with a “code-only” referral must bring ID if possible.

There are circumstances where a client has no suitable ID. Please do not hesitate to refer such a client; but for “code only” referrals, please contact the foodbank and agree the day and foodbank centre of their visit to avoid any risk of refusal.

ii. *Number of adults and children currently in the household*

These should already be correct, but can be edited at this stage if necessary.

iii. *Is anyone living in the household employed?*

Please record this information if known, or if the client is willing to share it. It does not affect in any way the help the client will receive from the foodbank.

iv. *Main cause of crisis*

Please record what you judge to be the main cause of the client's crisis.

Eleven main causes of crisis are offered. For most of these eleven crises, extra information can be recorded under *Main cause details*. For example, if the main cause is "benefit change", the details might be "sanction" / "job seekers allowance" / "13 weeks".

The recording of *Main cause details* is optional. However, they can be very helpful to the foodbank's understanding of the client's situation and need for support, as well as informing understanding about the drivers of food poverty.

If none of the eleven main causes of crisis are appropriate, you can select "other" and record relevant information in a text box.

v. *Secondary causes of crisis*

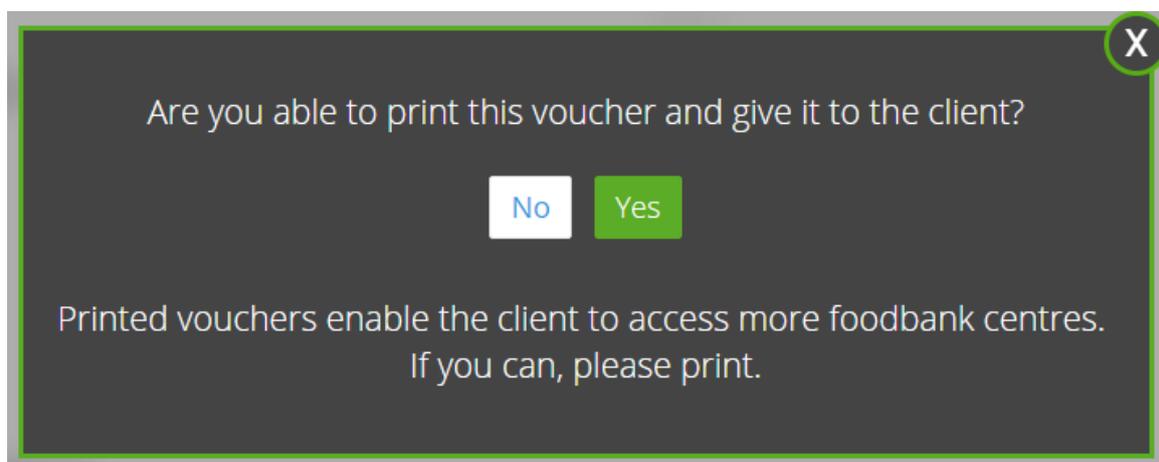
Many clients have multiple contributory problems, in addition to the main crisis. Please tick the ones that you believe apply to your client.

vi. *Additional notes for foodbank*

Use this to record anything you would wish the foodbank to know. This might include things like dietary constraints, language problems, or social difficulty.

However, these notes will only be visible when the foodbank accesses the voucher information in the data system.

Before proceeding you will be asked the following question, which determines the steps that will follow. If you select "No" you will go to *Step 5* and generate a "code only" referral. If you select "Yes" you will go to *Step 4* first and generate a printed voucher.



The screenshot shows a dark grey dialog box with a green border and a close button (X) in the top right corner. The text inside the dialog box reads: "Are you able to print this voucher and give it to the client?" Below this text are two buttons: a white button with the text "No" and a green button with the text "Yes". At the bottom of the dialog box, there is additional text: "Printed vouchers enable the client to access more foodbank centres. If you can, please print."

3. *Step 4: Choose foodbank centre*

At *Step 4* you will be shown location details, maps and opening times of the ten foodbank centres closest to the client's postcode in a straight line.

Four of these will be printed on the client's voucher. The four closest will already be ticked, but you can change that selection if other foodbank centres are preferable.

Click **Continue** to reach *Step 5*.

#### 4. *Step 5: Preview voucher*

Step 5 shows the final voucher. If it is to be printed, it will include maps and opening times of the selected foodbank centres.

|   |             |                               |  |                              |  |           |            |  |               |
|---|-------------|-------------------------------|--|------------------------------|--|-----------|------------|--|---------------|
|                |             | Issue date: 03/11/16          |  | Voucher code: <b>E</b> ----- |  |           |            |  |               |
| Please take this voucher to one of the suggested foodbank centres ideally within 3 working days |             |                               |  |                              |  |           |            |  |               |
| Partner foodbank:   |             | NETWORKDIS TEST, 01722 580180 |  |                              |  |           |            |  |               |
| Agency name:  |             | STAGING agency, Salisbury     |  | Issued by: tim partridge     |  |           |            |  |               |
|   |             |                               |  | Telephone: 01722 580172      |  |           |            |  |               |
| Client name: Rory Motion  |             |                               | Address: 2 Hiyaprice Flats, Skid Row, Slumpington, SP4 9ZZ   |                              |  |           |            |  |               |
| Adults in household:  | 17 - 24 yrs | 25 - 64 yrs                   | Over 65 yrs  | Age not known                | Children in household:   | 0 - 4 yrs | 5 - 11 yrs | 12 - 16 yrs  | Age not known |
|   | zero        | two                           | zero   | zero                         |  | zero      | zero       | zero   | zero          |
| Main cause of crisis:   |             | Benefit changes               |  |                              |  |           |            |  |               |
| Secondary causes of crisis:   |             | Low income, Debt              |  |                              |  |           |            |  |               |
|              |             |                               | <b>Opening times</b><br>Mon: 09:00-17:00<br>Sat: 09:00-17:00 |                              |  |           |            | <b>Opening times</b><br>Mon: 10:00-16:00<br>Tue: 09:00-13:00 |               |

Click **Save & generate voucher code** to reach the final step.

#### 5. *Step 6: Confirmation & print*

The final step displays the voucher number for this client referral.

- i. If you have selected to print the voucher you will see a **Print voucher** button.

Step 6 of 6: confirmation & print

✓ Voucher was successfully created.
✕

You have successfully issued one voucher to **Rory Motion** with a unique voucher code of **E 46601-00006**

The client can now choose to go to any foodbank centre convenient to them

Print voucher

This button generates a PDF of the voucher which can be printed. There is no need to save a copy of the PDF, as the voucher information can always be revisited via the data system.

Please do not send the client a copy of this PDF for them to print. That could be too easily abused.

- ii. If you selected not to print the voucher, you will be shown the foodbank centres nearest to the client's postcode that have been registered as accepting "code-only" referrals.

A client with a “code only” referral can only visit one of these foodbank centres (unless you have agreed specific arrangements in advance).

Step 6 of 6: confirmation & print

✓ Voucher was successfully created.

You have successfully issued one voucher to **Rory Motion** with a unique voucher code of **N 46601-00008**. Please make sure the client makes note of the voucher code as he/she will have to give it to the foodbank.

NB! Not all foodbank centres accept code-only referrals. Please make sure you direct the client to one of the foodbank centres listed below.

**Nearest foodbank centres that accept code-only referrals**

These are the closest foodbank centres to your client (if they provided a postcode) that accept code-only referrals. If needed, you can find more convenient foodbank centres by searching with different postcodes.

Postcode

Please note, at this trial stage, you will not see many results as only a limited number of foodbank centres accept code-only referrals.

| Foodbank centre   | Address                        | Opening hours | Buses/Directions | Trussell Trust/Independent |
|---|--------------------------------|---------------|------------------|----------------------------|
|  | unit 4<br>231 Earls Court Road |               |                  |                            |

When making a “code-only” referral, there are three things you must always tell the client:

- their voucher code (they must record this accurately and take it to the foodbank centre)
- the foodbank centre(s) that may be easiest for them to visit
- remind them to take suitable ID

If the client visits a foodbank centre that is not registered for “code only” referrals, the foodbank centre will have no way of checking the voucher code. The client is then likely to be refused.

The number of foodbank centres accepting “code only” referrals is likely to grow over time.

## Monitoring client use

The data system offers you several ways to monitor activity.

### Voucher search

You can use “voucher search” to look up details of a particular referral.

You could just enter the voucher code and click **Search**. However, there are more useful options available if you click **Show more search options**.

#### Search for vouchers

Please input full voucher code even if it begins with zero

Voucher code

Client first name

Client surname

Client address  Postcode

No fixed address/sensitive address

Issued from   to  

**Voucher prefixes explained**  
E – a white voucher created by E-referral  
R – a red voucher completed by hand  
N – a 10 digit E-referral code (no voucher)

For example, you could search for all referrals for a named client, or referrals related to a particular post code; or you could see all referrals made (vouchers “issued”) in a given period.

The search results will show, for each matching record, the voucher code, client name, issuer name, date of issue and status (“fulfilled” or “unfulfilled”).

| Voucher code                  | Client name                 | ID | Issuer name   | Issued to client | Status      |                      |
|-------------------------------|-----------------------------|----|---------------|------------------|-------------|----------------------|
| <a href="#">E.46601-00006</a> | <a href="#">Rory.Motion</a> |    | tim partridge | 03/11/16         | Unfulfilled | <a href="#">Edit</a> |
| <a href="#">N.46601-00008</a> | <a href="#">Rory.Motion</a> |    | tim partridge | 03/11/16         | Unfulfilled | <a href="#">Edit</a> |

Click the **Edit** button if you want to check or amend the “Voucher information”, such as main and secondary crises.

Alternatively, click on the client’s name if you want to check or amend the “Client details”, such as address.

## E-voucher list

The “E-voucher list” screen also gives you access to the “Voucher search” facility. More importantly, it lists the e-referral vouchers that your agency staff have issued.

| Vouchers issued by STAGING agency |   |   |               |                  |   |
|-----------------------------------|---|---|---------------|------------------|---|
| Filter by status                  | All  |   |               |                  |   |
| Voucher code                      | Client name   | ID  | Issuer name   | Issued to client | Status  |
| <a href="#">N 46601-00008</a>     | <a href="#">Rory Motion</a>   |   | tim partridge | 03/11/16         | Unfulfilled  |
| <a href="#">N 46601-00007</a>     | <a href="#">Maplin Blend</a>  |  | tim partridge | 17/10/16         | Unfulfilled  |
| <a href="#">N 46601-00006</a>     | <a href="#">Maplin Blend</a>  |  | tim partridge | 17/10/16         | Unfulfilled  |
| <a href="#">E 46601-00006</a>     | <a href="#">Rory Motion</a>   |   | tim partridge | 03/11/16         | Unfulfilled  |
| <a href="#">N 46601-00005</a>     | <a href="#">bob brown</a>   |  | -             | 24/08/16         | Fulfilled<br>24/08/2016   |

This will help you to monitor activity, showing when vouchers are issued and by which staff members. It will also show when vouchers are being used (“fulfilled”).

If it helps, you can filter this list just to see “fulfilled” or “unfulfilled” vouchers.

## Summary of features of referral routes:

|   | “Red vouchers”   | Printed e-vouchers<br>(“white voucher”) | “Code only”<br>e-referrals  |
|---|--|---|---|
| Printed voucher?                            | Yes<br>provided in advance<br>by foodbank              | Yes<br>printed by agency<br>as required | No  |
| Requirements:                               | pre-printed blank<br>foodbank vouchers<br>on red paper | access to data system<br>and printer    | access to<br>data system  |
| Acceptable at:                              | all foodbank centres                                   | all foodbank centres                    | identified foodbank<br>centres only<br>(where codes can be<br>checked live in the<br>data system) |
| Client needs to take<br>ID to the foodbank? | No   | Recommended                             | Yes   |
| Letter at start of<br>voucher number:       | R  | E                                       | N   |