



Cardiff

Foodbank

Together with Trussell

Training for Referral Agencies (E-referrals Walkthrough)



This presentation is for staff who are already familiar with Cardiff Foodbank's operations and the criteria for issuing vouchers. It only covers the process of issuing e-referrals.

Staff who are new to issuing vouchers should go through the full “Introduction to Foodbank and E-referrals” presentation.

FOLLOW / CONTACT US

Cardiff Foodbank,
Unit G, Cardiff Business
Centre,
Titan Road,
Cardiff

CF24 5BS
info@cardiff.foodbank.org.uk
(monitored Monday – Thursday)

vouchers@cardiff.foodbank.org.uk
(monitored Mondays and Thursdays only – use for voucher related enquiries)

Cardiff Foodbank



cardiff.foodbank.org.uk
trussell.org



@cardifffoodbank



 Cardiff
Foodbank
Together with Trussell

The Data Collection System

Vouchers are issued from the Trussell UK data collection system (DCS). The DCS also keeps a track of how many vouchers people have had, any changes of address or changing circumstances as well as information on the reason for the referral.



Importance of Accurate Information

Properly completed vouchers help to guard against fraud and confusion. They also ensure that the volunteers in the Distribution Centres don't need to ask the clients difficult questions about voucher details. It is important to make the experience of collecting the food as smooth and stress-free as possible.

If we suspect that someone is misusing the voucher system we will inform you, and we request that you inform us if you become aware of or suspect any misuse.



Using the Data

DCS information, including anonymised client data, can be used to bring about change on a national level. Trussell UK works to influence the UK Government and policy makers to ensure everyone has enough money to pay for the essentials.

Having accurate information is vital as it is used as evidence of the problem.



Referral Agency Manager Responsibilities

Each organisation will have a registered 'manager' who takes responsibility for keeping Cardiff Foodbank updated with the following key information:

- Change of main contact/manager
- Inviting new users to the database
- Change of organisation name/address
- Closure of the organisation
- Mergers



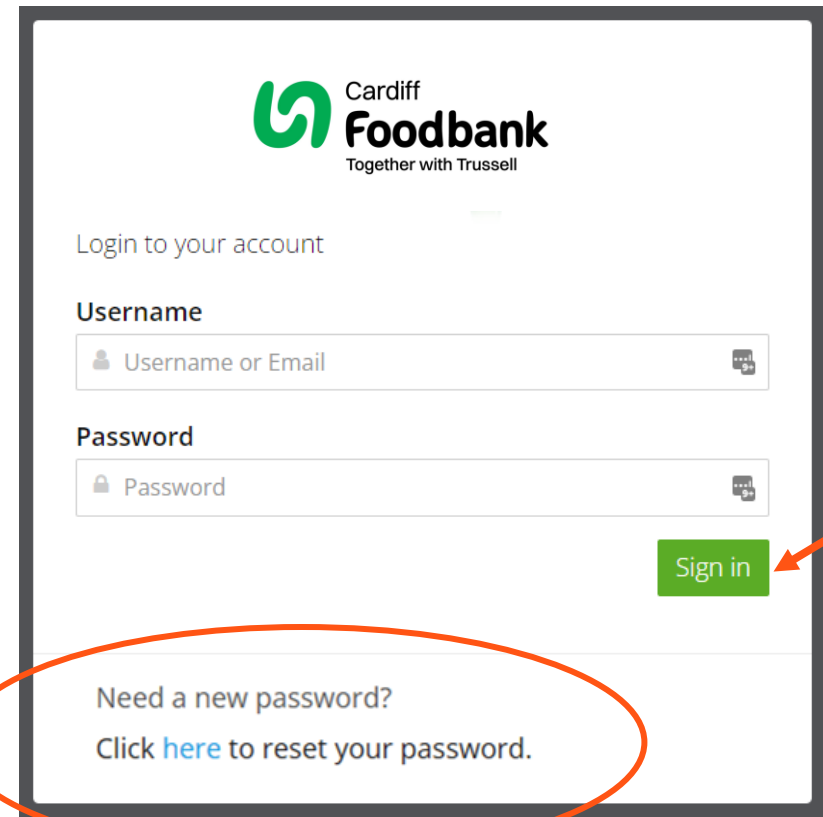
Issuing an E-Referral Voucher

A Step-by-Step guide for all voucher issuers.



Logging into the DCS

Access the Data Collection System (DCS) through URL:
<https://data.foodbank.org.uk/>



Cardiff Foodbank
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Login to your account

Username

Username or Email

Password

Password

Sign in

Need a new password?
Click [here](#) to reset your password.



Dashboard Clients Vouchers ▾ Contacts ▾ Stock Reports Settings ▾ Help resources Issue e-voucher lizdavies ▾

Dashboard

Updates




Cyber Security

09/02/2024 at 00:00 by Claire Jones





Please take some time (especially if you are a new user on the system) to read through our Cyber Security document which will give you guidance on how to keep your DCS account and the data contained within the system safe. The guidance can be found on the below link.

[Cyber Security Document](#)

Step 1 – search for the client



Foodbank
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[Dashboard](#)[Clients](#)[Vouchers](#) [Contacts](#) [Stock](#)[Reports](#)[Settings](#) [Help resources](#)[Issue e-voucher](#)[lizardavies](#) 

Clients

Search for client records across Trussell Trust Network

Enter at least a surname and full postcode or select as having no fixed address.

First name

Surname

Address

☒ Postcode

☐ No fixed address

Clear

Search

Step 1 – New clients

Clients

Search for client records across Trussell Trust Network

Enter at least a surname and full postcode or select as having no fixed address.

First name

Surname

Address ☒ Postcode

☐ No fixed address

[Clear](#)

[Search](#)

Ask the client if they have ever had a food bank voucher before - if yes then they will have an account already. If it comes up as no results, try searching with a different spelling or previous postcode (or NFA). This should help you find them and their previous information.

No results found for "Joe Bloggs - CF24 5BS"

Has the client changed name or address? Consider searching again using client's previous postcode or by other name the client might be known by.

If you cannot find the correct client please [Create new client record](#)

Scroll down to check for alternative spellings or Address/Postcodes

Your food bank network's clients at "CF24 5EJ"

[Collapse details](#)

Please check if any vouchers were issued to clients living at the same household.

Please take that into consideration when deciding whether to issue a voucher to the client.

Name	Postcode	Last voucher issued	Last voucher fulfilled	Vouchers issued in last 6 months
Joe Bloggs	CF24 5EJ	16/09/24	-	2

Your food bank network's clients with last name "Bloggs"

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
Joe Bloggs	CF24 5EJ	16/09/24	-	2

[Expand details](#) ▾

If the client is found this way, continue with the process but edit the account rather than creating a new one.

Client details

First name

Joe

Surname

Bloggs

☐ Mark record as sensitive

When marked as sensitive, the client record will appear only in your own food bank's client list and will not be visible to other food banks

Address

- ☒ Address available
- ☐ No fixed address

Address line 1

Address line 2

Town

County

Postcode

CF24 5BS

Year of birth

Select year... ▼

Create a New Client Account

- First name
- Surname
- Address/postcode or No Fixed Address (NFA)
- Year of birth



Household structure questions

This is the usual number of people within that household - temporary members can be added later.

The usual household structure

Enter a number of people in relevant age groups. Exclude temporary household guests. You can adjust the number of people the voucher is for on step 3 of the voucher issuing process.

Adults

17-24 yrs

persons

25-34 yrs

persons

35-44 yrs

persons

45-54 yrs

persons

55-64 yrs

persons

65-74 yrs

persons

75+ yrs

persons

Not specified

persons

Children

0-4 yrs

persons

5-11 yrs

persons

12-16 yrs

persons

Not specified

persons

Is the person referred a partner or spouse of anyone in the household?

☐ Yes ☐ No ☐ Prefer not to say ☐ Unable to ask

Is the person referred a parent or carer for any of the children in the household?

☐ Yes ☐ No ☐ Prefer not to say ☐ Unable to ask

Enter number of people in age band
Do not enter their age directly

Save

[Cancel](#)

Confirmation that you have successfully created a new account

Check the details and edit if needed

✓ Client was successfully created. ✕

Personal details

[Edit details](#)

Name

Liz Davies

Year of birth

-

Address

Unit N5, Cardiff Bay Business Centre, Titan Road
Cardiff
CF24 5EJ

The usual household structure

[Edit details](#)

Number of people in the household

Adults: 225-34 yrs: 135-44 yrs: 1

Children: 15-11 yrs: 1

Is the person referred a partner or spouse of anyone in the household?

Yes

Is the person referred a parent or carer for any of the children in the household?

Yes

?

Editing Page

Step 2 of 6: client details

Client details

First name Joe

Surname Bloggs

Address Unit G, Cardiff Bay Business Centre
Titan Road
Cardiff

Postcode CF24 5EJ

Year of birth 2000

Number of adults in the household	17-24 yrs	25-34 yrs
	1	1

Number of children in the household	0-4 yrs	5-11 yrs	12-16 yrs
	1	1	1

Is the person referred a partner or spouse of anyone in the household? Yes

Is the person referred a parent or carer for any of the children in the household? Yes

[Update client details](#)



If the client has changed address - you can edit the basic details. Just click on the button.

[Back to previous page](#)

Continue

Clients

Search for client records across Trussell Trust Network

Enter at least a surname and full postcode or select as having no fixed address.

First name

Joe

Surname

Bloggs

Address

☒ Postcode

CF24 5EJ

☐ No fixed address

[Clear](#)

[Search](#)

When more than 3 vouchers
have been issued in 6
months, this number will be
highlighted in red

Results found for "Joe Bloggs - CF24 5EJ"

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	
Joe Bloggs	CF24 5EJ	16/09/24	-	2	Expand details ▾

Click to find out
more information on
voucher history

[Voucher history](#)

[Signposting history](#)

No vouchers

[Select all](#)

Voucher code

Issued to client

Status

Signposting

Fulfil

Actions

[Expand all ▾](#)

Fair processing notice – please read to the person being referred

Fair processing notice

We use your personal information to help understand your needs and provide you with emergency food. The food bank and the Trussell Trust have a legitimate interest to use information about you to show how food banks are being used and why they are needed.

Access to your information is restricted and can only be seen by the agencies who refer you, and authorised people in the Trussell Trust food bank network who need to do so for food bank reasons.

To find out more about your rights or about how we keep your information safe, please ask the food bank to give you a copy of their privacy statement.

[View the full Privacy Statement v](#)

- ☐ The person being referred has been offered this fair processing notice and/or full privacy statement
- ☐ Person referred not present

[Continue to the next step](#)

[Back to previous page](#)

Ethnic group of person being referred

The ethnicity entered here is not visible to the food bank or the Trussell Trust after the voucher has been issued, and individuals are not identified in any reports. Collecting this data enables the food bank to look at trends and create reports on the ethnicity of people referred to them compared to the local area. Please ask for the explicit consent of the person being referred to record this information.

White

- ☐ English, Welsh, Scottish or Northern Irish
- ☐ Irish
- ☐ Gypsy or Irish Traveller
- ☐ Roma
- ☐ Other

Mixed or multiple ethnic groups

- ☐ White and Black Caribbean
- ☐ White and Black African
- ☐ White and Asian
- ☐ Any other mixed/multiple ethnic background

Asian or Asian British

- ☐ Indian
- ☐ Pakistani
- ☐ Bangladeshi
- ☐ Chinese
- ☐ Any other Asian background

Black or Black British

- ☐ African
- ☐ Caribbean
- ☐ Any other Black background

Other ethnic group

- ☐ Arab
- ☐ Any other ethnic group

No answer

- ☐ Prefer not to say
- ☐ Not asked

Individual client ethnicity data is not stored on the client record. This is because it is only used for statistical reporting processes and is not available to view on an individual basis.

Ethnic group of person being referred



This person has previously provided their ethnic group, so it doesn't need to be entered again.

For data privacy reasons, this information is not stored in their record. Therefore we cannot display the ethnic group previously selected.

It is only associated with the referral for statistical reporting purposes. However, if the person being referred isn't comfortable with that, you can [permanently remove any association with their ethnic group information from the system](#)

In the unlikely scenario that you need to change the ethnic group, you can [re-enter their ethnic group again](#).



Step 3 of 6: referral information

Referral agency information

Contact details are needed in case a food bank has a question about the voucher.

Agency the voucher is issued by/on behalf of

Agency contact telephone

This will be displayed on the printed e-voucher.

Agency contact email address

This will not be displayed on the printed e-voucher.

Person who issued voucher

ALL ABOUT YOU

Please make sure the telephone number is one that you are happy for clients to potentially call you on. This number will be displayed on a printed voucher. Use your work number not a personal one.

Please ensure this is entered. Your email won't be displayed on the printed voucher but it is very helpful for us if we need to get in touch with you.



Number of people the voucher is for (by age group)

Enter the number of people the voucher is for.

Adults

17-24 yrs

1 persons

25-34 yrs

1 persons

35-44 yrs

0 persons

45-54 yrs

0 persons

55-64 yrs

0 persons

65-74 yrs

0 persons

75+ yrs

0 persons

Not specified

0 persons

Children

0-4 yrs

1 persons

5-11 yrs

1 persons

12-16 yrs

1 persons

Not specified

0 persons

“How many people is this food voucher for?”

Is the person referred a partner or spouse of anyone in the household?

- ☒ Yes ☐ No ☐ Prefer not to say ☐ Unable to ask

Is the person referred a parent or carer for any of the children in the household?

- ☒ Yes ☐ No ☐ Prefer not to say ☐ Unable to ask

This may include people who are only temporarily staying in the household.

Client’s contact details (optional)

Did the client give consent to collect their phone number and email address?

The food bank may need to contact the client to discuss their needs or arrange a delivery time.

- ☐ Yes ☒ No

This is only needed if the client is needing a delivery
We do not do deliveries.

Notes regarding parcel requirements

Additional parcel notes (will appear on the printed e-voucher that the person referred can see)

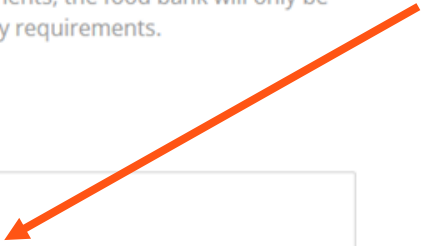
Referred person's consent to sharing their dietary requirements

- ☐ I agree to the food bank holding information about my dietary requirements, including information linked to my health or beliefs for the purpose of providing a nutritionally appropriate food parcel.

If a person does not provide consent to sharing their dietary requirements, the food bank will only be able to provide a standard food parcel that may not meet their dietary requirements.

Dietary requirements (will appear on the printed e-voucher)


Please include any relevant dietary information.



Max 400 characters

Additional parcel notes (will appear on the printed e-voucher)

Please use this box to record other relevant information the food bank needs to prepare an appropriate parcel, such as access to cooking facilities or enquiries about additional items such as nappies, sanitary products or toiletries. Please note that not all food banks can provide these additional items.



Max 200 characters

Ask about specific dietary requirements - Food intolerances, Vegan, Halal, Medical (diabetes) etc. These can be added here.

Ask about other relevant information - what facilities do they have to cook/prepare food, do they need any non-food or other additional items to support them.

NB

Anything you write here will be visible on the printed voucher

[Back to previous page](#)

[Continue](#)





Step 4 of 6: reason for referral

Referred person's current situation

This helps us to understand more about why people need to come to the food bank.

We can use this to work with other agencies to prevent people needing a food bank, and campaign to the Government for more help for people in difficult situations.

Source of income in the household

- ☐ Earning, no benefits
Includes pension income.
- ☐ Earning and benefits
Includes child benefit.
- ☐ Benefits, not earning
- ☐ Income but no or insufficient access to it
For example, no access to a bank account.
- ☐ No income
- ☐ Declined to answer
- ☐ Unable to ask

“What is the source of income for the household from the following options?”

Reasons for referral

You can select up to four reasons for referral.



Up to 4 reasons can be selected from both this page and the next .

Financial - earnings related

- ☐ Change in work hours
- ☐ Unemployment following permanent work
- ☐ Unemployment following temporary work
- ☐ Delay in or awaiting other income

Financial - benefits related

- ☐ Benefit delay
- ☐ Benefit deduction due to overpayment or benefit advance
- ☐ Benefit reduction due to change in eligibility
- ☐ Benefit reduction due to sanction
- ☐ Awaiting first benefit payment for less than a month
- ☐ Awaiting first benefit payment for more than a month

Financial - debts, costs and expenses

- ☐ Priority debt
Priority debts will cause you serious problems if you don't do something about them soon, for example, rent or mortgage, gas or electricity bills, court fines.
- ☐ Non-priority debt
Non-priority debts include credit cards, unsecured loans, loans from friends and family.
- ☐ Cost of dependents has increased
For example, if costs increased due to summer holidays.
- ☐ Rising costs of essentials
- ☐ Other unexpected expense

“What has happened which means you need a food parcel today?”

Please enter any other information that you feel would be relevant for us to know – this will not be visible on the printed voucher but will be visible to volunteers in our distribution centres.

Personal circumstances

- ☐ Insecurely housed
- ☐ No access to financial support due to immigration status
- ☐ Loss of support from friends or family
- ☐ Change in relationship status
- ☐ Domestic abuse
- ☐ Change in dependents

Health

Before collecting health information, please get consent from the person being referred for the food bank and the Trussell Trust to use this information for statistical monitoring and reporting purposes, and to signpost to other support.

- ☐ New physical or mental health condition
- ☐ Ongoing impact of physical or mental health condition
- ☐ Change in existing physical or mental health condition

or

No answer

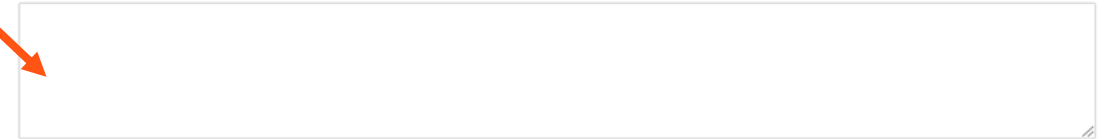
- ☐ None applicable
- ☐ Declined to answer
- ☐ Unable to ask

Notes

Please enter any additional information that may be relevant to the food bank when providing support.

Privacy Information

By providing this information, you confirm that the person being referred gives their explicit consent for the use of this personal information, including any information about their health [or ethnicity]. This information is used to provide appropriate support and onward guidance. This information is visible only to you as the referring agency and the food bank the voucher is issued to.



Max 400 characters

Health

Before collecting health information, please get consent from the person being referred for the food bank and the Trussell Trust to use this information for statistical monitoring and reporting purposes, and to signpost to other support.

- ☒ New physical or mental health condition
- ☐ Ongoing impact of physical or mental health condition
- ☐ Change in existing physical or mental health condition

! By providing this information and proceeding to the next step, you confirm that the person being referred gives their explicit consent for the food bank and the Trussell Trust to use this information for statistical monitoring and reporting purposes, and to signpost to other support.

Reason for needing more than 3 vouchers in the last 6 months

This client has been issued 3 vouchers in the last 6 months. In order to help the food bank understand the situation, please provide additional information.

Before collecting this information, please get consent from the person being referred for the food bank and the Trussell Trust to use this information for statistical monitoring and reporting purposes.

- ☐ Awaiting first benefit payment
- ☐ Benefit delay or sanction
- ☐ Debt
- ☐ Domestic abuse
- ☐ Drug or alcohol dependency
- ☐ Homelessness
- ☐ Long term health condition
- ☐ Long term unemployment
- ☐ No access to financial support due to immigration status
- ☐ Other - low income
- ☐ Other

If you select this option, you must add details in the 'Notes' field.

Notes

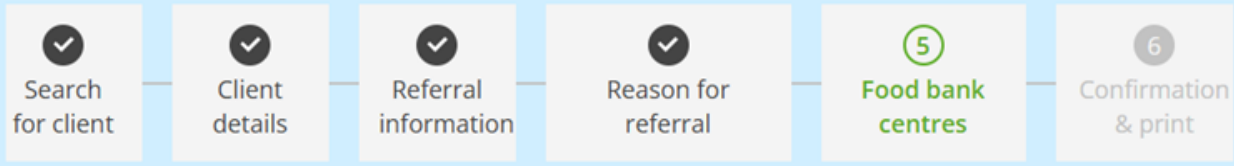
Add any relevant details about the reason for needing an additional voucher. Be aware that the person referred would be shown these notes if they made a 'subject access request' under data protection legislation.

“What would you say is the reason for needing long-term or continued support of the food bank?”

If this is looking like a long term issue – please call Cardiff Foodbank for further support and authorisation

NB

Ensure that you would be happy if the person being referred was given access to this information if they request it.



Step 5 of 6: nearest food bank centres

Delivery and collection information

Is the client able to collect the parcel from the food bank?

Only a limited number of food banks can deliver. Only select "no" if the client is unable to collect the parcel and there is no one who can collect the parcel on their behalf.

- ☐ Yes, the food parcel can be collected
- ☐ No, the food parcel will need to be delivered

Did the client give consent to collect their phone number and email address?

The food bank may need to contact the client to discuss their needs or arrange a delivery time.

- ☐ Yes
- ☐ No

Collection and delivery notes for the food bank

For example, specify if someone else will be collecting on the client's behalf or if there is a particular time that client is not able to answer the phone regarding the delivery.

Please do not record sensitive personal data within this box, for example, information about a person's physical or mental health, ethnicity, religion or other types of special category data.

A large, empty rectangular text box for entering collection and delivery notes.

[Back to previous step](#)

Confirm selection and issue e-voucher

Please double check
“Are you able to collect the
parcel from the food bank?”
Don't forget – we don't
deliver!

ASK

“How are you going to get home with the food
parcel?”

There might be a number of bags depending on
size of the household.

Add the name or details of a third party collecting the food parcel -
Could be a friend, relative, support worker etc.
This information can help protect the client from potential fraud or
abuse and ensure that they receive the parcel.

Showing food bank centres near CF24 5EJ

Search by alternative postcode to find more convenient food bank centres

Postcode

CF24 5EJ

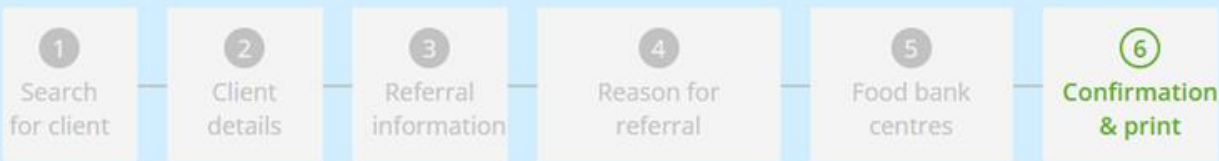
Search

“Which foodbank centre is best for you to visit” Not just distance, but opening hours etc.

Please select the most suitable food bank centre for the client from the table below.

Food bank centre	Address	Opening hours	Collection notes	Delivery notes
<div><div><div>Closest</div><div>FBC Splott</div><div>0.47 miles away from postcode</div><div>info@cardiff.foodbank.org.uk</div><div><div><input checked="" type="checkbox"/></div><div>This centre is part of Cardiff food bank</div></div></div></div>	<div>St Saviour's Church</div> <div>Splott Road</div> <div>Cardiff</div> <div>CF24 2BW</div> <div>View in Google Maps</div>	<div>Wed: 13:00-15:00</div> <div>Thu: 18:30-20:00</div>	<div>✓ Collection</div>	<div>✗ No delivery</div>
<div><div><div>FBC Central</div><div>1.5 miles away from postcode</div><div>info@cardiff.foodbank.org.uk</div><div><div><input checked="" type="checkbox"/></div><div>This centre is part of Cardiff food bank</div></div></div></div>	<div>City Church</div> <div>Lower Cathedral Road</div> <div>Cardiff</div> <div>CF11 9AD</div> <div>View in Google Maps</div>	<div>Thu: 10:00-12:00</div>	<div>✓ Collection</div> <div>Use Lower Cathedral Road entrance.</div>	<div>✗ No delivery</div>

Tick the most relevant box – this is not set in stone – they are still able to attend a different centre if needed



Step 6 of 6: confirmation & print



You have successfully created a single use voucher for **Joe Bloggs** with a unique voucher code of **E 69205-000190**.
The food bank has received the voucher details.

If you prefer, you can also give a physical voucher to the client.

[View and print voucher](#)



Do you need to contact the food bank centre?

The food bank will receive the voucher details. You do not need to notify the food bank, unless this was requested in the food bank's delivery or collection information. If you would like to follow up the referral, you can do so via email info@cardiff.foodbank.org.uk.

E-69205-000190 - This is the code to give the client - It is a one time only code.
Each additional parcel requires a new voucher and code.



Please take this voucher to the selected food bank centre,
ideally within 7 days.

Agency name:	Cardiff Foodbank,	Issued by:	Liz Davies
		Telephone:	07908536276

Referred person's name:	Joe Bloggs	Address:	Unit G, Cardiff Bay Business Centre, Titan Road, Cardiff, CF24 5BS
Phone number:		Email:	

Source of income in the household:	Earning, no benefits
Reasons for referral:	Change in work hours Priority debt New physical or mental health condition

Number of people the voucher is for (by age group)					
0-4yrs	5-11yrs	12-16yrs	17-24yrs	25-34yrs	
1	1	1	1	1	

Additional parcel notes:	
--------------------------	--

Assigned food bank centre

FBC Splott

Opening hours

Wed: 13:00-15:00

Thu: 18:30-20:00

Address

St Saviour's Church, Splott Road, Cardiff, CF24 2BW

-

Collection notes

-

If you are unable to go to the food bank centre above, you may be able to take this voucher to a different food bank centre. To find other food banks in your area, please check www.trusselltrust.org/get-help/find-a-foodbank

This voucher has no monetary value, cannot be used by another person, and should be used within 7 days of issue if possible.

We use your personal information to help understand your needs and provide you with emergency food. The food bank and the Trussell Trust are data controllers and have a legitimate interest to use information about you for statistical and research purposes, to show how food banks are being used and why they are needed.

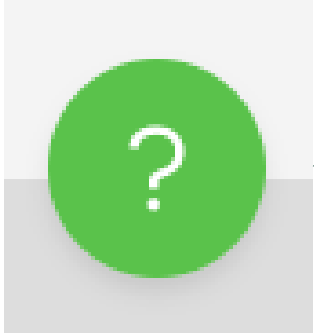
Access to your information is restricted and can only be seen by the agencies who refer you, and authorised people in the Trussell Trust Foodbank Network who need to do so for food bank reasons. To find out more about your rights or about how we keep your information safe, visit <https://trusselltrust.org/privacy> or please ask the food bank (Reg. Charity [1139456]) to give you a copy of their privacy statement.

It would help us if you could bring some carrier bags with you.

The voucher is valid for up to 7 days and even then can still be redeemed on approval with valid reason for delay - if no valid reason, the voucher may be cancelled and another one will need to be issued.

This is just the 'suggested' foodbank centre - they can take this voucher to any centre as long as they accept e-referrals

Help and Support



Support available via the DCS.
Click either icon when logged in.

Help resources

Cardiff Foodbank
vouchers@cardiff.foodbank.org.uk
<https://cardiff.foodbank.org.uk/referral-agency>
02920 484120

To find contact details for other food banks
in the Trussell network:

<https://www.trussell.org.uk/emergency-food/i-have-a-food-voucher>

Thank you for watching this presentation

If you have any questions
don't hesitate to contact us

