**Central Connect – Exess Food Bank procedures**

The procedures detailed below are to be used to administer Foodbank clients (including spouse/partner) and service food parcel referrals. There will be a separate part of the database for the Food Bank clients. However, practioners can add food parcel requests (referrals) to any of their own clients. All staff will be given appropriate access to Food Bank clients where required.

These section describes the different procedures and who would normally use them.

Section 1 Add a new Food Bank client (recipient of food parcel) Support staff

Section 2 Add a food parcel referral to a Food Bank client Support staff

Section 3 Add spouse / partner of Food Bank client Support staff

Section 4 Add a food parcel referral to a Central Connect client A Practitioner

Section 5 Add food parcel referral to an existing Central Connect client Support staff

**Notes**

1. If the Foodbank client already exists then only a new food parcel referral has to be entered against the Food Bank client.
2. If Exess tells you that the client already exists as a Central Connect client, do not continue. In stead, use Section 5.
3. The food parcel referral is added to the food parcel requester, never to the spouse/partner.
4. Mostly, Food bank referrals are made by staff from Work & Income and Budget Advice or the client refers themselves. However, referrals can be made by many other agencies.

New

Foodbank

Client?

Central

Connect

Client?

Foodbank

Referral

No

External CC

(Agencies &

self referral)

Yes

Internal CC

from

Practitioners

No

Yes

Complete section 1 & 2

If Spouse / Partner

details available

then complete

section 3 also.

Complete section 2

Complete section 5

Complete section 4

End

**Section 1 Add a new Food Bank client (recipient of food parcel) Support staff**

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| a. | Insert new Food Bank client | * Navigation Panel. Click 'New Client' entry. * Click the 'person picker button' * Enter the First Name and Surname in the field called 'Person's Name' (e.g. John Hope). * When you do that Exess will tell you if the person does exists or not. * If the person is already on the database then then check if it is an existing Food Bank client or a Central Connect client (use the Search function). * If the client is a Central Connect client then go to section 5 and continue there. * If the client is already a Food Bank client then go to section 2 and continue there. * If the client does not exist yet then add the client. You do that by clicking on the little button between the field and the close button (hover your cursor over it and it will say 'Add new person'). * Exess will present a new panel called Person Editor with 2 tabs of importance to you (the Core Details tab and the Home Address tab. * You have to retype the First name(s) and the Surname at the top (tab Core Details). * Complete the Date of Birth, Gender, Primary Ethnicity (Ethnicity 2 if required) * Click on Home Address tab and complete the fields Address, Town and Post Code. * Now go back to the Core Details tab and click Save. * And then Close. * Exess will now display the person you have newly entered. Click on the name of the person and the panel will disappear and the at the top of your Exess screen you can now click on the Submit botton to enter this person in the Food Bank database. * A new screen comes up and you now have to click CHB Foodbank in Available branches and Foodbank Service in Available services. * Now click on the Submit button and then click the Edit Client button. |
| b. | Add foodbank information in client record | * Complete the Income Source field. Save. * Complete the Role field by selecting Food Bank client. * Complete Additional Info field. Enter in this field the number of Children ( and if possible their ages) and the number of Adults. Use the following format 'Foodbank: Children 2 (2, 13), Adults 2'. * If there is some general info about the client to be added then add these to the Comments field and add to the Additional Info field “See comments”. * A better way is to record any required general information through a Case Note (see section 1c. A Case Note is dated and gives ample space to record any required information. * Save (at the bottom of the screen). |
| c. | Add a Case Note | * Open relevant Food Bank client (if not already open) and click on the Case Notes tab. * Click on New Case Note. * The Add Case Note panel is opened. * Select the Foodbank Service. * Give it the proper date (normally it is the date and time already there). * Give it an appropriate title, for example: “Work & Income appointment”, “Referred to Budget Advice” or “Reasons for self-referral”. * Click Create Case Note. * A new panel open with a few tabs. In first instance you are in tab Core. * Make sure that the Foodbank Service is selected in the field Service. * In field Contact Type select “Food Bank contact” * In field Duration select the approximate time (number of minutes), you have been working on this Foodbank referral. * Click on tab Case Note. * Now add the details of what you want to record for this client regarding the food bank referral. * When finished, click on Core tab and then Save. |

**Section 2 Add a food parcel referral to a Food Bank client Support staff**

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| a. | Navigate to required Foodbank client | * Navigation panel, click Client and then click Search. * Enter the surname (of the original food parcel requester) in Keywords field. Click Search button. * Click on the Foodbank client you want to add a food parcel. |
| b. | Enter the food parcel request | * Click on the Reports tab on the Foodbank client screen. * Under the Report Items section you find any food parcels previously received. * Now add any new food parcel request by clicking on 'Add Report Item'. * A new panel comes up titled Client Report Item Editor. * Enter the referral date in the Date field. Often this is the current date. * Select the Food Parcel entry from Report Item field. * Leave Quantity as 1 and Value as 0. * Enter the number of Adults and Children as per Referral form. * Ckick the Save button. |
| c. | Add the referral | * Go to Summary of Client screen of the Foodbank client. * Scroll down to Client Referral History. Click 'New referral' button. * If it is self-referral click on 'Self-referral?' tickbox. * If not a self-referral choose from the entries of the Referrer field. * Enter the date of the referral in the 'When referred' field. * Click the 'Referral Accepted?' box if accepted otherwise leave blank and enter the reason why this referral was declined. * Save the referral now. * If there was a Food Bank referral form: * Open the referral again by clicking on the Edit button of the referral. Go the Files tab of the referral and upload the document (see standard upload procedure). * File the referral form (see standard procedure) |

**Section 3 Add spouse / partner of Food Bank client Support staff**

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| a. | Insert new Food Bank client | * Navigation panel, click Client and then click Search. * Click the 'person picker button' * Enter the First Name and Surname in the field called 'Person's Name' (e.g. John Hope). * When you do that Exess will tell you if the person does exists or not. * If client already exists * If the name does not exist then add the client. You do that by clicking on the little button between the field and the close button (hover your cursor over it and it will say 'Add new person'. * Exess will present a new panel called Person Editor with 2 tabs of importance to you (the Core Deatils tab and the Home Address tab. * You have to retype the First name and the Surname at the top (tab Core Details). * Complete the Date of Birth, Gender, Primary Ethnicity (Ethnicity 2 if required) * Click on Home Address tab and complete the fields Address, Town and Post Code. * Now go back to the Core Details tab and click Save. * And then Close. * Exess will now display the person you have newly entered. Click on the name of the person and the panel will disappear and the at the top you can now click on the Submit botton to enter this person in the Food Bank database. * A new screen comes up and you now have to click CHB Foodbank in Available branches and Foodbank Service in Available services. * Check that the date in the Started field is todays date. * Now click on the Submit button and then the Edit Client button. |
| b. | Add foodbank information in client record | * Complete Additional Info field. This field must contain the Foodbank client name of their partner or spouse. For instance, Jane Hopper is living with Gary Tisco. Jane requested the food parcel and is the primary requester of the food parcel. So, in Gary's Additional Info field you will see: 'Foodbank: Spouse/partner of Jane Hopper'. * Complete the Income Source field. * Complete the Role field by selecting Food Bank client. * Click Save (at the bottom of the screen). |
| c. | Link the food parcel requester client to her/his partner / spouse client | * Navigation panel, click the Search entry. * Enter the surname of the food parcel requester in the Keywords field. Click Search button. * Click on the Foodbank client (the food parcel requester). * Go to the Edit tab and scroll down to the 'Linked Clients' section. * Click on Edit Clients Links button. * A new panel opens called the Client Link Editor. * Click the Change button to add a new client link. * A new panel opens called Client Picker. * On the left side you find the names of the Available Clients (Food Bank only). * First find the spouse/partner and click on the name. * Now click on the '>' sign in the middle between the two panels. You now see that the name you selected appears in the right panel. * Now click the Save button. |
| d. | Link the partner / spouse client to the food parcel requester client | * Navigation panel, click Search entry. * Enter the surname of the spouse / partner in the Keywords field. Click Search button. * Click on the name of the spouse / partner of the food parcel requester. * Go to the Edit tab and scroll down to the 'Linked Clients' section. * Click on Edit Clients Links button. * A new panel opens called the Client Link Editor. * Click the Change button to add a new client link. * A new panel opens called Client Picker. * On the left side you find the names of the Available Clients (Food Bank only). * First find the food parcel requester of the spouse/partner and click on the name. Now click on the '>' sign in the middle between the two panels. You now see that the name you selected appears in the right panel. * Now click the Save button. |

**Section 4 Add a food parcel referral to a Central Connect client A Practitioner**

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| a. | Enter the Food Bank Service | * Navigation panel, Search for the relevant Client. * Open the client. * Check if a Food Bank service has been created before. If not: * Create a new service and Select Food Bank. * Enter the Starting date of the Service. Normally todays date. * Save |
| b. | Enter the Food Bank referral | * Go to Summary of Client screen of the Foodbank client. * Scroll down to Client Referral History. Click 'New referral' button. * Select yourself as the referrer, i.e. Penny @ Central Connect. * Enter the date of the referral in the 'When referred' field. * Click the 'Referral Accepted?' box. * Save the referral now. * Open the referral again by clicking on the Edit button of the referral. Go the Files tab of the referral and upload the document (see standard upload procedure). * File the referral form (see standard procedure). |
| c. | Enter the food parcel request | * Now click on the Reports tab. * Click on Add Report Item. A new panel opens called Client Report Item Editor. * Now enter the date (normally todays date) * Select the entry Food Parcel in the field Report Item. * Select the Foodbank Service in the field Service. * Quantity is always 1 food parcel. * Value field is not used. * Enter the number of Adults in the Adults field and similarly the number of children in the Children field. * Click Save. |

**Section 5 Add food parcel request to an existing Central Connect client Support staff**

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| a. | Na | * Navigation panel, click Client and then click Search. |
| b. | Ent | * Click on the Reports tab on the Foodbank client screen. |
| c. | Ad | * Go to Summary of Client screen of the Foodbank client. |