



## Five Simple Reminders for Completing Referrals

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The following are five steps for completing referrals:

### 1. Use the Correct Referral Form

- A list of service categories that require a referral are located on the “Referrals Overview” Tab of the Requirements to be Eligible and Qualify Spreadsheet. The “Referrals Overview” tab provides a link to the most current referral form.  
<http://ochealthinfo.com/civicax/filebank/blobdload.aspx?BlobID=31965>
- The referral forms are also individually located under the Referral Process and Templates section of the HIV Planning and Coordination Resource Documents.  
<http://ochealthinfo.com/phs/about/dcepi/hiv/service/docs>
- When forms are updated, an email is sent out to inform providers. Be sure to inform staff when there are changes and delete previous versions of the referral form.

### 2. Complete the Referral Form in its Entirety

- The form is intended to be completed on Word as a “form document.” No sections should be left blank.
- The provider/agency receiving the referral is not expected to or responsible for filling in blanks on the referral. The provider may return the referral for full completion.

### 3. Submit Required Documents with the Referral

- Send a Release of Information (ROI). An ROI is needed for new referrals or if the ROI has expired.
- Send Proof of Disability. Proof of Disability is not required for all services. Review criteria for the service before sending Proof of Disability.
- Send additional forms. Additional forms may be required for certain services (i.e., food pantry, supplements, home-delivered meals, etc.).
- Referring providers are **not** required to submit Proof of HIV diagnosis, copy of identification, or an Eligibility Verification Form, for example, with the referral unless specifically required on the referral form.

### 4. Submit an ARIES Consent Form, when needed

- A modified ARIES consent form is required for non-share clients who are accessing services at another agency (See instructions for completing ARIES consent forms under the ARIES section of the HIV Planning and Coordination Website  
<http://ochealthinfo.com/phs/about/dcepi/hiv/service/docs>).

### 5. Communicate, Communicate, Communicate

- Failure to complete a referral form in its entirety will lead to delays in processing referrals. If the referring provider is unsure of how to complete the referral form discuss with a supervisor or HIV Planning and Coordination staff prior to submitting the referral.
- If you need to include a note to the agency receiving the referral, try to include the note on the actual referral form and not the fax cover sheet as the fax cover sheet may get separated from the referral.

**Following these five steps will help to facilitate the referral process and decrease delays.**