Referrals in CommCare

Referrals allow your mobile workers to refer cases to other CommCare users. Below are three ways to track referrals using case management.

1) Form Display Condition

Adding a display condition to your form—just as you would a display condition on a question—allows you to set the given form to display based on the value of a case property. Using a form display condition in this way enables you to build referral followup forms in the same module and set them to display only when a given case property is true, for example, your case property ‘is referral’ = ‘yes’.

*Advantage*: Easy to use, doesn't add modules to your application.

*Challenge*: Difficult to evaluate referrals historically, as they are not tracked by separate cases.

See more about “display logic for forms” [here](#).

2) Case List Filtering

Putting a filter on your case list enables you to only show cases based on a given value in the case properties. Similar to Form Display Conditions above, to use Case List Filtering you will add a "referral" case property to your case, then create a separate "referral" module filtered to show cases only if the case property ‘is referral’ = ‘yes’. Optionally, you can set your main followup module to filter out referred cases, thereby only showing cases if the case property referral does not = ‘yes’.

*Advantage*: Visually separates referred cases from regular cases, useful when you want a separate workflow for referrals.

*Challenge*: Hard to evaluate referrals historically, as they are not tracked with separate cases.

See “filtering the case list” [here](#).

3) Child Cases

Many partners open a "child case" to create a referral. Child cases have the following important characteristics:

a) You can open the child case into a different case list, to be tracked separately from the parent case.

b) The child case will not close automatically when the parent case closes.

c) The child case can access and update case properties of its parent case at any time.

You can open a "referral" child case into a different "referrals" module, which contains forms associated that referral.

*Advantage*: Easy to see and evaluate referrals data, since they are tracked as separate cases.

*Challenge*: When the parent case is closed, the referral child case remains open.

See more about "Child Cases" [here](#).