

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'.

Advantages: 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](#).