INTEGRITY CONNECT

Household Members & Profile Linking

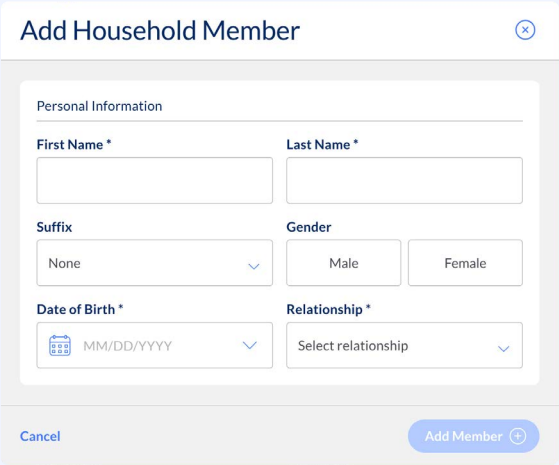
Household members let you track the people connected to a client's policy — spouses, children, dependents — directly on their profile. Once a household member is added, you can link them to their own contact record so they have a searchable profile with their own email, phone, and date of birth on file.

Adding a Household Member

1. On the client's profile, find the **Household** card and select the edit icon.



2. In the **Add Household Member** window, enter the member's First Name and Last Name, plus Suffix and Gender if applicable. Enter their Date of Birth and choose a Relationship (e.g., Spouse, Child, Stepchild) from the dropdown. Select **Add Member** to save.

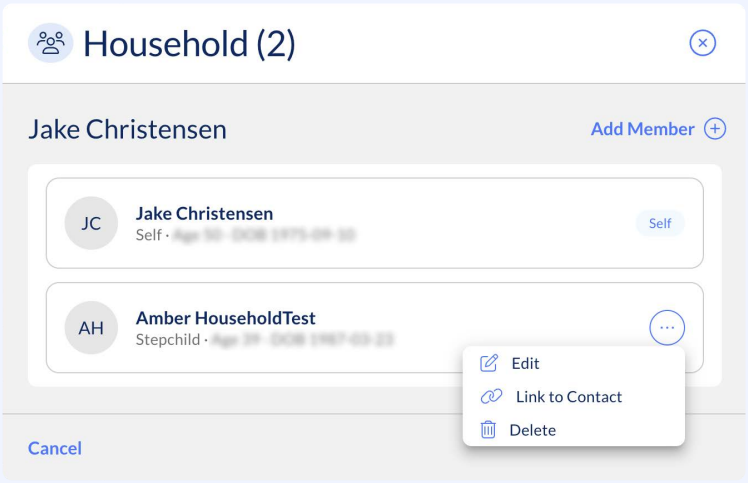


The household member now appears in the Household card alongside any existing members.

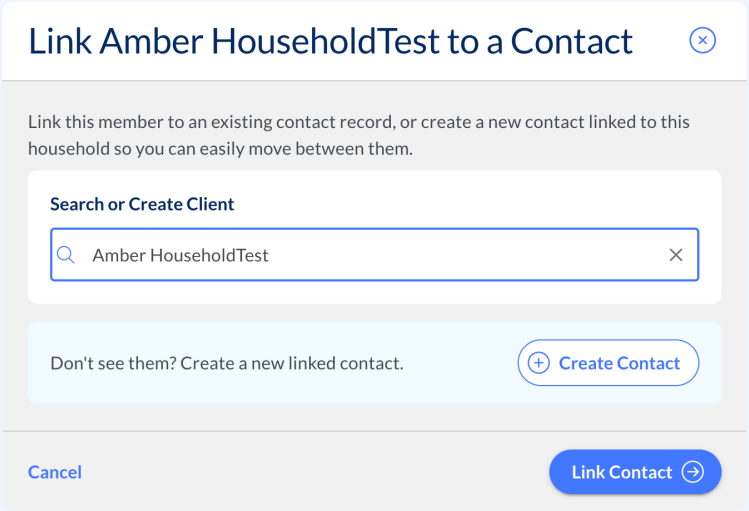
Linking a Household Member to a Contact

Linking connects a household member to their own contact record, so they can be reached and managed independently of the primary policyholder.

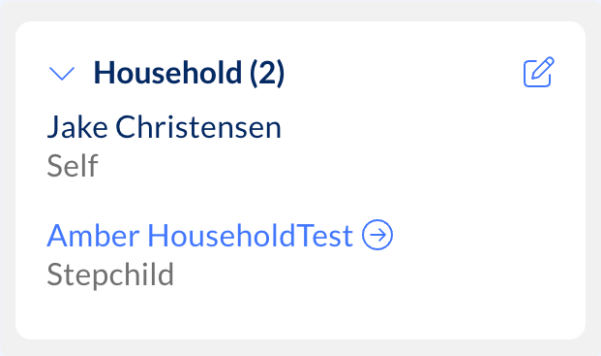
3. Reopen the **Household** card using the edit icon.
4. Select the ⋯ menu next to the household member's name and choose **Link to Contact**.



5. In the **Create and Link a Contact** window, confirm the member's name, then add an Email Address or Phone Number — at least one is required. If you enter an email, confirm it shows as **Email Verified** before continuing. Confirm the Date of Birth, then select **Create and Link to Contact**.



Once linked, the household member's name appears as a clickable link in the Household card, confirming their contact profile is connected.



Unlinking a Household Member from a Contact

If a contact is linked incorrectly or leaves the household, it's easy to detach the records.

6. Reopen the **Household** card using the edit icon.
7. Click **Detach**.
8. You're all set!